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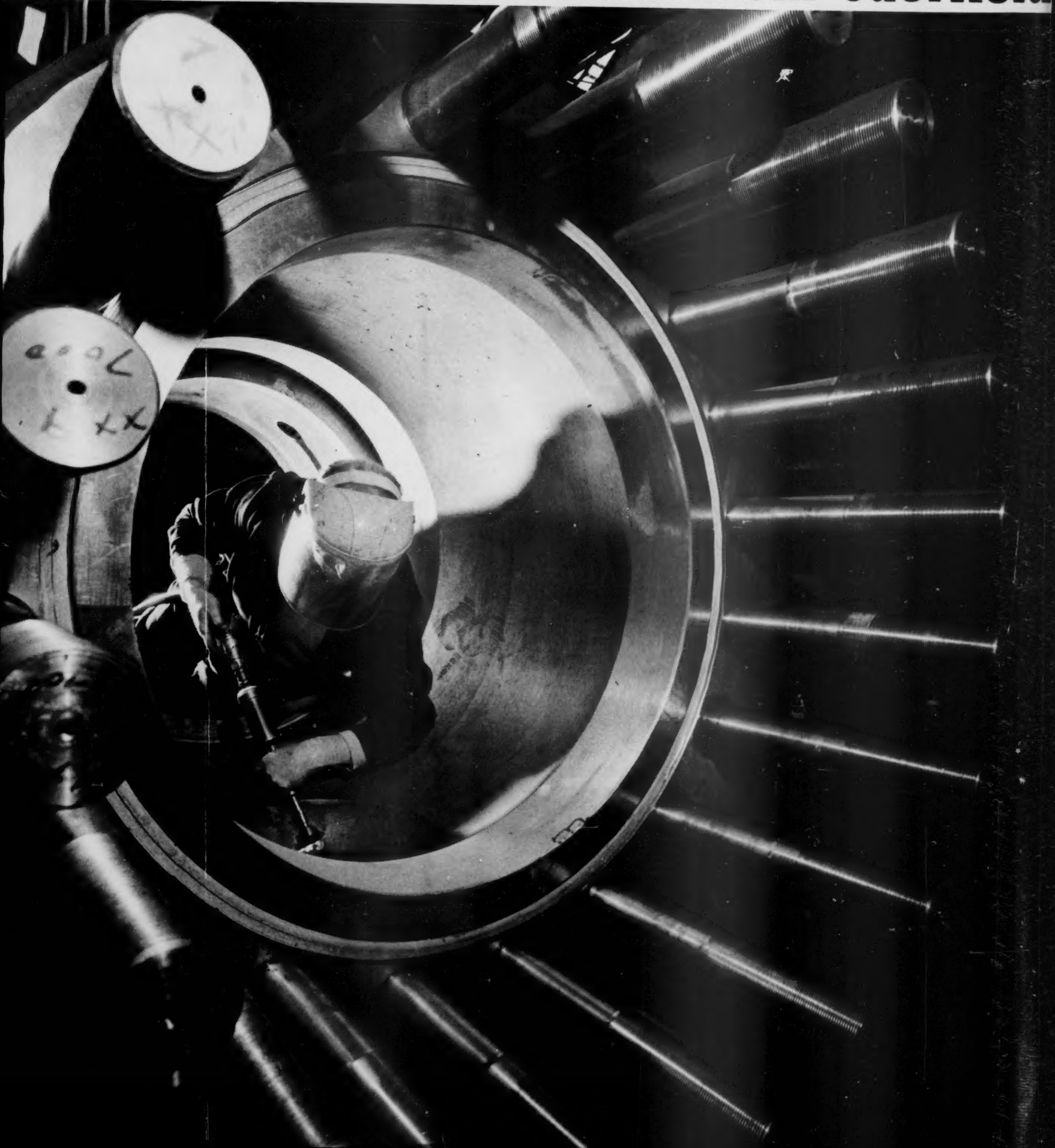

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Trade and Industry

10 February 1978

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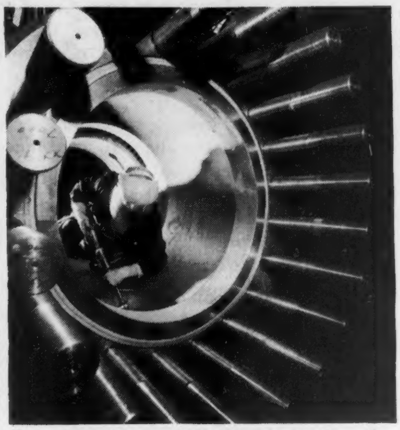

Our cover picture shows the de-burring of the casing of a massive pump at the Glasgow factory of Weir Pumps Ltd, one of Britain's suppliers to the south-east Asia oil industry. This week's overseas feature reports on the development of the oil industry in south-east Asia and examines the prospects for British suppliers (see page 290).

Trade and Industry

Incorporating the Board of Trade Journal

Volume 30 no. 6.

Pages 257 to 328. 10 February 1978.

Price 40p. Net subscription post inclusive, £30.60.

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ABC Member of the Audit Bureau of Circulations
ISSN 0006-5323

This week

Non-ferrous foundry aid of £8m remains 258
Burden of form-filling being cut 258
Certainty for consumers in 1978 – Fraser 258
Anglo-French investment seminar in Paris 258
Two shipbuilding redundancy schemes 259
Young engineers to compete for industry prizes 259
Low-margin coffee scheme ends 259
New impetus to UK-Chinese relations – Dell 259

Home news

Show running costs of domestic appliances – Maclennan 260
Demand for energy-efficient products – Cunningham 260
Consumer appointments to water authorities: applications invited 260
Conference to review standards' role in the Industrial Strategy 260
Public purchasing seminar next month 260
WDA awards contracts for £10m Hoover project 262
SDA offers low-interest loans 262
Advance factories for expanding manufacturers: at Wigan . . . 262
. . . and at Barrow-in-Furness 262
Airports . . . BAA reports traffic up 262
. . . CAA plans new terminal facilities 262
Air Travel Reserve Fund publishes report 263
Fisons accepts price rule on garden products 263
BR conditions 'unfair and out-of-date' – Borrie 263
Consumer Credit Act 1974: certain agreements secured on land to be exempt agreements 263
NEB appoints chairman of Fairey Holdings 264
Official appointments 264
Merger proposals cleared 264
Patents endorsed 'licences of right' 264
Government sales 265
Particulars of dealers in securities and of unit trusts 265
Customers mean jobs – Edwardes 266
Industrial Strategy: from analysis to action 268

New publications 272

New products 274

Technology news 276

Parliament 278

Overseas trade news

UK-Romanian trade talks held in Bucharest 284
EETC reports on Romanian market 284
BOTB assistance for UK firms at Bucharest 284
More than 140 British firms pitch for orders in US 284
Increasing British participation at fashion shows 286
Trade missions from over 30 countries to UK in February and March 286
ECGD extends cost-escalation scheme . . . 286
. . . and backs highest-capacity undersea link contract 287
Firth Brown awarded Export Year certificate 287
JCB launches its own Export Year 287
British aid grant to Sudan 287
UK industry gains £11m from aid 287
Go ahead given for £28m Sealink ferries 287
THE stages agricultural and construction equipment events 287
Big increase in sales of British foodstuffs to Canada 287
Scottish chambers to send oil mission to Brazil 288
Blue Circle to present technical seminar in Peking 288
City visit from the Philippines 288
Chamber organises Arab seminar 288
Chamber to hold Yemen debriefing meeting 288
Trade missions organised for engineers 289

Notices to importers

1659: Iron and steel – imports from Romania 289
1660: Validity of import licences granted under transitional measures 289
1661: Taiwan – UK residual textile quotas 289
Oil confidence returns in south-east Asia 290

Export services 298

Country data 301

European community news

EEC-China trade agreement initialled 305
UK to maintain existing fish conservation measures – Silkin 305
No EP powers extension without act of parliament 305
Commission's data-processing projects 305
Proposals for certain 1979 EEC tariff quotas 306
Proposals on materials in contact with food issued 306
EEC – your questioned answered 307
Tobacco taxes: health and harmonisation 309

Statistics

The economy: selected indicators 310
Changes in the external trade statistics for 1978 312
Manufacturers' prices rose 1¼ per cent in January 318
Rebasing of retail sales indices 318
Business names and limited partnerships in Great Britain in 1977 319
Official reserves in January 319
Retail sales in December 319
Hire purchase and other instalment credit business in December 320
Man-made fibres: deliveries in fourth quarter, production in December and analysis of production in fourth quarter 322
Cotton industry: production in November 323
Hosiery and other knitted goods: index of production in November 324
Wholesale textile houses: sales and stocks in November 324
Business Monitors 324
Aquisitions and mergers of industrial and commercial companies: fourth quarter 1977 325
Private sector's share of labour force on the increase 326
Increase in UK energy consumption forecast 326
British Film Fund Agency returns 327
Registrations of British, community and foreign films 327
Index to statistics 327

Readers' reply service 328

Trade and Industry this week

HOME

Non-ferrous foundry aid of £8m remains

More than 150 companies have responded to the government's scheme to encourage and assist new investment and improve the structure of the non-ferrous foundry industry. Progress of the first 12 months of the scheme was reviewed in Birmingham on Tuesday (7 February).

Chairman of the scheme's advisory committee John Ray advised industrialists in the non-ferrous foundry industry that there was only £8 million of aid left in the kitty and reminded them that the scheme closed on 31 July 1978. 'If you want your share of the cake my advice is do not leave it to the last minute but get your applications in as soon as possible.'

More about the scheme and its progress to date will be published in *Trade and Industry* next week.

Burden of form-filling being cut

Action has been taken to ensure that all the business statistic inquiries conducted by the Department of Industry are worthwhile. The Business Statistics Office is playing its part in cutting down the form-filling burden by making sure that all the questions are necessary and that the forms go to as few firms as possible.

Speaking on Monday (6 February) at a seminar on industrial statistics organised by his department and the Trade Union Research Unit, Les Huckfield, Parliamentary Under-Secretary of State at the Department of Industry, said that the government was responding to the complaints of form-fillers, especially smaller firms.

The statistics office was currently piloting a new kind of personalised form for use in the quarterly inquiries which listed only those products which individual respondents were known to make. It was hoped that these forms would be brought into general use for all of the quarterly inquiries from the beginning of 1979. This should mean almost all small firms would in future receive a single page form.

Sampling techniques

Sampling techniques had already been employed to good effect in other statistical inquiries. It was expected that with a few small exceptions all distribution and service inquiries would henceforth be sample inquiries. For the census of distribution taken in 1971, for example, a complicated return was sought from each of the 350 000 retail organisations in existence.

For the 1976 retailing inquiry, however, the first of the new series of annual sample inquiries that had replaced the censuses, only 30 000 businesses out of the 300 000 or so within the scope of the inquiry were asked to complete forms. For the second inquiry to be taken this year, it would be possible to reduce the sampling size to 25 000 without prejudicing the desired accuracy of the results.

Mr Huckfield concluded by saying that to correct some of the misunderstanding about what the statistical office did he was stepping up a series of initiatives to familiarise firms with the work done by the office. This would include conferences and seminars and new ideas on 'feeding back' results of inquiries to form-fillers so that they could compare their performance with the average of their industry.

On other pages

Home News
Customers mean jobs – Edwardes 266
Industrial Strategy: from analysis to action 268

Overseas trade news
UK-Romania trade talks held in Bucharest 284
Oil confidence returns in south-east Asia 290

European community news
EEC-China trade agreement initiated 305
EEC – your questions answered 307
Tobacco taxes: health and harmonisation 309

Statistics
Changes in the external trade statistics 312
Manufacturers' prices rose 1¼ per cent in January 318
Rebasing of retail sales indices 318
Acquisitions and mergers of industrial and commercial companies 325

Certainty for consumers in 1978 – Fraser

This year should be a year of clarity and certainty for the shopper, said John Fraser, Minister of State for Prices and Consumer Protection, on Tuesday (7 February). Speaking to the annual consumer reception of the British Standards Institution, he said that certainty included certainty of price, certainty of quality, certainty of safety and certainty of rights.

The year would bring a substantial period of single-figure inflation, he said. That meant that price increases would be lower than for many years and price increases would be far less frequent. Stability and a reasonable certainty about prices had been earnestly awaited and were now arriving.

'But consumers also want clarity and truth about price display. There are often areas where price display is the most effective form of price control because consumers can then exercise the powers of buying or boycotting. In 1978 we intend to go for a big push on price display as well as price restraint.'

Quality standards

Mr Fraser added that quality was a matter on which it was notoriously difficult to legislate for minimum standards. Rights could be conferred if these goods were sub-standard but it was much more difficult to avoid the occasions when the rights had to be exercised. Advice and information–labelling helped but he looked to the British Standards Institution and to manufacturers and retailers to promulgate and observe standards which gave reassurance and certainty to consumers.

Anglo-French investment seminar in Paris

An Anglo-French seminar, to be held in Paris on 14 February, will be told of the favourable investment climate and Industrial Strategy of the United Kingdom by Alan Williams, Minister of State at the Department of Industry.

The seminar is part of a continuing campaign aimed at informing European businessmen of the attractions of investing in Britain. It is being organised by the department's Invest in Britain Bureau and the British embassy in Paris.

The experience of a French industrialist based in the UK will be described by Jacques Glain, Vice President, L'Oreal. Other speakers will include Mr G. Wright, secretary of the Wales TUC, on industrial relations; Mr J. L. W. Price of the Merseyside Development Office, on communications and the regions; and Mr C. L. Silver of the Department of Industry, on regional financial incentives.

Two shipbuilding redundancy schemes

Under government shipbuilding redundancy schemes announced on Tuesday, no employee would receive less than £300 providing he had been employed for not less than one year. The schemes would cover all prescribed classes of employees of less than 65 years-of-age.

Gerald Kaufman, Minister of State for Industry, told parliament that two identical schemes would be introduced, one for British Shipbuilders, and the other for Harland and Wolff. Both would begin on 1 July 1977.

An enabling bill, the Shipbuilding Redundancy Payments Bill, has now completed its committee stage in the House of Commons. The final schemes will be introduced by statutory instrument.

Young engineers to compete for industry prizes

Job opportunities, a sea trip to study underwater technology, a scholarship and industrial visits are among prizes announced on Wednesday for the 1978 Young Engineer for Britain competition organised by the joint government and industry Project – Engineers and Technologists for Tomorrow (Pett) and the BBC.

'British industry is providing magnificent support for this important national competition,' said Jimmy James, chairman of Pett. 'For example, Courtaulds are to provide an individual five-year sponsorship through university with a scholarship for a potential chartered engineer; and in the field of job opportunities Lucas Industries will award a job for one or more of those in the competition who show themselves to be of substantial merit, as well as £1,000 in cash.'

The Young Engineer for Britain competition is designed to encourage and develop inventive talents in schools; a talent which needs to be attracted to industry and about which industry needs to be aware. This year's competition, the second of its kind, is for young people between 16 and 19 from schools and industry.

Regional finals are planned for October and November, and the national final will take place at Pebble Mill, Birmingham late in December this year or early in January 1979.

Low-margin coffee scheme ends

Rapidly falling prices of instant coffee have made it possible to end the low-margin coffee scheme. It was announced on Wednesday (8 February) by Roy Hattersley, Secretary of State for Prices and Consumer Protection, and Joseph Godber, chairman of the Retail Consortium, that the scheme will end this week.

Control of coffee prices

Both sides agreed that the scheme had helped to control coffee prices during a difficult time and had concentrated attention on the need to reflect reductions in world prices as quickly as possible.

Fall in prices

The drop in raw coffee prices, consumer resistance and the forces of competition have already led to substantial falls in prices in the shops and may lead to further reductions.

The Retail Consortium considers that consumers have sufficient re-assurance that they will continue to be able to buy coffee at a reasonable price and that the scheme has imposed a considerable burden upon retailers.

The secretary of state has accepted this assessment and has agreed that the scheme has now served its purpose.

Into Denmark: the friendly market

The UK is currently Denmark's third largest supplier and Denmark's largest customer. A special report on this still-expanding EEC market will be published in the 24 February issue of *Trade and Industry.*

OVERSEAS

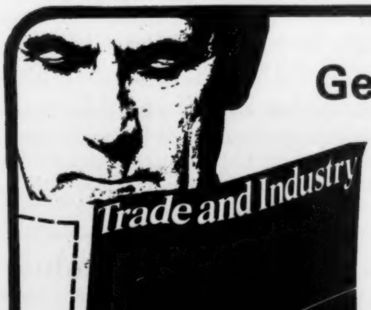
New impetus to UK-Chinese relations – Dell

Increasing two-way visits between the UK and China have resulted in a new impetus in UK-Chinese relations, especially in economic matters, Edmund Dell, Secretary of State for Trade, said on Monday (6 February).

Speaking at a London conference 'China and Britain – the prospect for trading', Mr Dell said that senior officials from China's State Planning Commission and State Capital Construction Commission were expected to visit Britain later in the year. These organisations played an influential part in assessing China's foreign trade priorities, he said. He pointed out that China's foreign trade might well triple in real terms over the next 20 years, offering the prospect of a steadily expanding market for British industrial goods.

The opportunity for some manufacturers of capital plant and industrial machinery could be considerable, Mr Dell indicated, provided their technology was advanced and internationally competitive. China had shown a strong interest in a variety of sectors, including technology and capital equipment for oil and gas extraction, railways and power generation.

See 'EEC-China trade agreement initialled', page 305.



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Home news

Show running costs of domestic appliances – Maclennan

An investigation into better ways of informing consumers about the running costs of domestic appliances has been asked for by Robert Maclennan, Parliamentary Under-Secretary of State for Prices and Consumer Protection. Fuel accounts for a significant proportion of consumers' expenditure and the energy consumption of different modes and brands of the same type of appliance may differ significantly. Full details could enable consumers to make a more informed choice of purchase in terms of efficiency and cost and encourage manufacturers to take greater account of energy consumption in design.

At a meeting on 1 February with Naomi McIntosh, Michael Barnes and David Tench, the chairmen of the National Gas, Electricity and Domestic Coal Consumers' Councils, Mr Maclennan asked them to consider the problem and to put forward suggestions as to how details of energy consumption and the efficiency of appliances could be presented to consumers in a helpful way.

Sixty years' service

Bob Cryer, Parliamentary Under-Secretary of State for Industry, attended a presentation ceremony on 31 January to mark 60 years service by Mrs Lily Jarvis with the London firm of A. Lewis (Airlok) Ltd. Founded 100 years ago by the grandfather of one of the present directors, the company now employs 50 people manufacturing high-quality leather products. About 80 per cent of their production is exported, much of this to the United States. In addition to Mrs Jarvis, the company has many other long-serving employees who have spent their working lives with the firm,and has workers of many different nationalities.

Demand for energy-efficient products – Cunningham

Consumers will increasingly look for products which do not fall below a good standard of energy efficiency, Dr John Cunningham, Parliamentary Under-Secretary of State for Energy, told an energy conservation conference organised by the British Standards Institution on 31 January. He added that if this country could not also minimise energy use at the production stage, it would not be able to compete in international markets.

Dr Cunningham thought that consumers would increasingly look for energy-efficient products, especially in the heating field and that British Standards Institution could play a vital part. Government, he said, would be delighted to help them to do so, for instance by using the 'Save It' campaign to encourage people to buy products with a BS number on them – once it was known that that number meant energy efficiency.

Consumer appointments to water authorities: applications invited

Robert Maclennan, Parliamentary Under-Secretary of State for Prices and Consumer Protection, on 31 January welcomed the appointment of the first consumer representative to a regional water authority. Mrs Pat Brown has been appointed by Peter Shore, Secretary of State for the Environment, to the Thames Water Authority specifically to watch over consumer interests.

Mr Maclennan, who proposed the appointment, pointed out that this was the first step in implementing the government's intention, announced in the white paper 'The Water Industry in England and Wales: the Next Steps', to appoint consumer members to each of the water authorities. He hopes that this will have been achieved by the end of the year.

The Department of Prices and Consumer Protection is concerned with many appointments of people to protect consumer interests in this and other fields and Mr Maclennan would welcome applications and nominations from anyone interested in being considered for such work. They should be addressed to the Parliamentary Under-Secretary of State, Department of Prices and Consumer Protection, 1 Victoria Street, London SW1H 0ET.

Conference to review standards' role in the Industrial Strategy

How the government, manufacturers and the British Standards Institution can best work together to match the standards making process to the objectives of the Industrial Strategy is to be reviewed at a one-day conference in London on 17 May. Roy Hattersley, Secretary of State for Prices and Consumer Protection, is to give the opening address.

The conference is a follow-up to the Warner report on standards and specifications in the engineering industries which was commissioned by the National Economic Development Council. It will look at the use of standards in legislation, their adequacy as purchasing specifications and the need to relate both of these to export performance.

The Department of Prices and Consumer Protection is organising the conference in conjunction with the Department of Industry, National Economic Development Office, Confederation of British Industry and British Standards Institution. The conference fee is £25.00, including VAT. Further details and application forms are available from the Conference Officer, Conference on the Role of Standards in the Industrial Strategy, Department of Prices and Consumer Protection (MQS), Room 442, Abell House, John Islip Street, London SW1P 4LN, tel. 01-211 6781/4875.

The report by Sir Frederick Warner, 'Standards and specifications in the engineering industries', price £2.00, may be obtained from NEDO Books, Steel House, 11 Tothill Street, London SW1H 9LJ, tel. 01-222 0565.

Public purchasing seminar next month

A one-day seminar, on public purchasing and supply for today and tomorow, will be held at the Lord Daresbury Hotel, Warrington, on 9 March.

The seminar, organised by the Institute of

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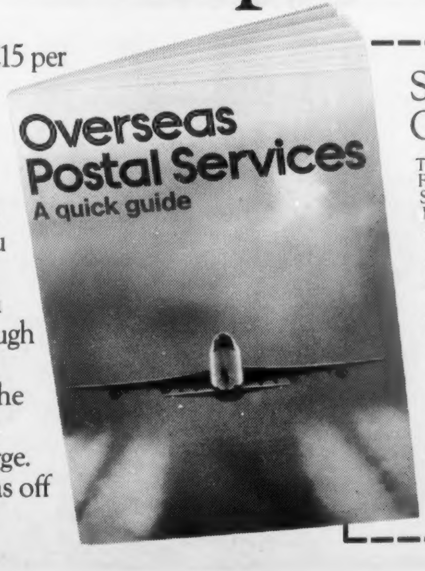

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Purchasing and Supply, is aimed not only at those directly concerned with purchasing and supply on a day-to-day basis but also at departmental heads, elected representatives or members of boards. Among the speakers taking part is John Hughes, deputy chairman of the Price Commission, whose address, 'The Price Commission – The New Style', covers the 1977 Act and its implications for the public services.

Further information is obtainable from Mrs C. Moulang, Conference Administrator, Institute of Purchasing and Supply, York House, Westminster Bridge Road, London SE1 7UT.

WDA awards contracts for £10m Hoover project

Building work will start in March on the Welsh Development Agency's £10 million project to provide a manufacturing complex for Hoover Ltd at Merthyr Tydfil, Mid Glamorgan. The project represents the WDA's biggest single investment to date.

Contracts to Cardiff

Contracts for the construction of a 400 000 sq ft production and administrative unit have been awarded to George Wimpey and Co Ltd and G. Percy Trentham Ltd, both of Cardiff.

The complex is to be built on a 25-acre reclaimed site at Abercanaid adjacent to the existing Hoover washing machine factory, and construction work is due to be completed towards the end of 1979.

SDA offers low-interest loans

Loans of up to £30,000 at 3 per cent below the normal interest rate are being made available by the Scottish Development Agency's small business division.

The concessionary rates will mean interest at 6½ to 9 per cent a year instead of the current 9½ to 12 per cent. The key factor in qualifying for the money, which can be used for new machinery, buildings or working capital, is the creation of new jobs in country areas.

The low-interest loans are available to companies in towns and villages with populations of less than 15 000 and retail, agriculture and horticulture trades are not eligible. A separate scheme will apply within the area covered by the Highlands and Islands Development Board. Since the agency took over the role of the Small Industries Council for the Rural Areas of Scotland (Sicras) in 1975, loans to small businesses have risen to £1 million for some 300 ventures. Almost 600 new jobs are expected to result from this investment.

Advance factories for expanding manufacturers: at Wigan . . .

Borden (UK) Ltd, a company producing moulding powders and synthetic resins in Wigan, is to occupy a local 900 m² advance factory built by the English Industrial Estates Corporation on the Department of Industry's Lamberhead Industrial Estate. The company requires the new factory for expansion of its existing products and the manufacture of new resins. It is expected that the expansion will eventually create 30 additional jobs.

. . . and at Barrow-in-Furness

Sub Sea Surveys Ltd is to occupy advance factory terrace unit premises of 230 m² built by the English Industrial Estates Corporation for the Department of Industry at Barrow-in-Furness.

Sub Sea Surveys operates, designs and manufactures remote-controlled submersible vehicles for use in the offshore oil industry. The company was formed in 1976 and at present is housed in small office premises in Barrow. Larger premises are required for both operational and maintenance work and the company expects to employ an additional 22 people in the terrace unit over the next few years.

German insecticide manufacturer opens Devon plant

Globol-Werk GmbH, the German-based insecticide company has recently expanded its sphere of operations in the UK, with the opening of a new factory, Globol Chemicals (UK) Ltd, at Bampton, Devon. Globol extended its activities to the UK to reduce import costs and to be able to introduce new lines at competitive rates. It decided to set up the new factory in the west of England, because it says the communications systems now bring the rest of the country into easy reach. The 300 m² factory was acquired through the Council for Small Industries in Rural Areas (Cosira) acting for the Development Commission. Already 10 line operators and staff have been employed and it is envisaged that by the end of 1978 the work force will have been increased to 20 people.

Airports . . . BAA reports traffic up

The seven airports controlled by the British Airports Authority showed an overall increase of 970 000 passengers (3 per cent) last year. Passenger traffic was affected by unusual factors including the British Airways' maintenance engineers' and the air traffic control assistants' disputes as well as the temporary withdrawal of part of British Airways Trident Three fleet for structural modifications.

Domestic and short-haul flights, says the authority, suffered more than long-haul, and scheduled services tended to be cancelled while charter flights were delayed. The outcome was that Heathrow, where traffic went up only 0.6 per cent, and the Scottish airports, down 1.9 per cent, fared worse than Gatwick and Stansted, up 15.2 and 11.9 per cent respectively.

Gatwick's growth was helped by a massive 94 per cent increase in US charter traffic plus a 24 per cent rise in domestic passengers. In Scotland, Glasgow's domestic traffic dropped 15 per cent and European charters 14 per cent while at Aberdeen, oil company charters to Sumburgh showed an 81 per cent increase in passengers.

The total cargo handled rose by nearly 10 per cent to reach 607 000 tonnes. Heathrow's 6.4 per cent increase was helped in the autumn by a two-month US dock workers' strike.

. . . CAA plans new terminal facilities

Civil Aviation Authority is to provide improved terminal facilities at its Inverness and Kirkwall aerodromes. Sir Frederick Snow and Partners has been appointed to work out cost and programme details in order to obtain the necessary planning and financial approvals.

An extension to the terminal building at Inverness is planned to provide customs and immigration passenger-handling facilities.

At Kirkwall improved passenger, baggage and freight-handling facilities are proposed, as well as improvements to the present temporary security-checking facility.

Air Travel Reserve Fund publishes report

The report of the Air Travel Reserve Fund Agency for the year ending 31 March 1977 was published on 27 January. The report finds that administration costs are now minimal and with the reduction in bonding levels and the cessation of the levy in October last year, it will be the duty of the agency to invest its funds to the maximum advantage and to conserve its funds to meet any future liabilities.

The funds of the agency at 31 March 1977 totalled £9,446,695 compared with £1,035,065 in 1976. Now the major liabilities placed upon the agency at the time of its formation had largely been paid and the only current liability that fell upon the fund was that for Intercontinental Holidays Ltd which failed on 19 August 1976 and resulted in a liability to 31 March of £33,875. Further claims in respect of this Atol holder will fall into the current year.

During the year under review a small number of claims came forward from 1974-75 in respect of Frontier Expeditions, Kentways, Stowcleve and Western Orient Ltd and, the nature of these being highly complicated, they were only admitted after much detailed examination.

BR conditions 'unfair and out-of-date' – Borrie

British Rail should take a close look at all its booking and carriage of luggage conditions to see whether they still matched up to what could be expected of a publicly-owned, socially-responsible undertaking in 1978, suggested Gordon Borrie, Director-General of Fair Trading, on 1 February.

He pointed out that the Unfair Contract Terms Act, in plain language, wiped out those clauses in contracts and booking conditions by which firms and undertakings had avoided legal responsibility for death or injury when caused by negligence. Other conditions could be subject to a test of reasonableness in the courts.

Mr Borrie said that he understood that British Rail's lawyers had been looking at their 'Conditions of Carriage of Passengers and Luggage' in the light of the new act but did not expect to have revised conditions available to rail travellers immediately. He would like to suggest that they took a really searching look at the booking conditions and produced a new printed version of them as quickly as possible because some of the printed conditions that were currently available to passengers seemed to be quite unfair to travellers and, in one or two cases, ludicrously out-of-date. In fact, he suspected some of the conditions had been carried over out of habit from the days of the old private railway companies.

He gave some examples of BR conditions which he felt needed re-examination and said that he thought British Rail would improve its image a good deal by making it clear that it would voluntarily give its customers a better deal.

Consumer Credit Act 1974: certain agreements secured on land to be exempt agreements

Under section 16(1) of the Consumer Credit Act 1974, the Secretary of State for Prices and Consumer Protection may by order exempt from the greater part of the controls imposed by the act certain consumer credit agreements which are secured on land where the creditor is named in an order.

'The Consumer Credit (Exempt Agreements) (Amendment) Order 1978'[1] will come into force on 1 March 1978. The new order amends part I of the schedule to 'The Consumer Credit (Exempt Agreements) Order 1977' (SI 1977 no. 326) by listing for the first time the following two insurance companies and one friendly society:

Citibank Assurance Company Ltd
Target Life Assurance Company Ltd
Nottingham Oddfellows Friendly Society

It is expected that further orders will be made under section 16(1) as circumstances warrant. Submissions for exemption may be submitted by any organisation falling within section 16(1) of the Consumer Credit Act 1974 being an insurance company, a friendly society, an organisation of employers or organisation of workers, a charity, a land improvement company or a body corporate named or specifically referred to in any public general act. Further information may be obtained from Miss P. J. Rankin, CCC2/Consumer Credit Branch, Department of Prices and Consumer Protection, Room 171, 1 Victoria Street, London SW1H 0ET, tel. 01-215 3583.

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[1] 'The Consumer Credit (Exempt Agreements) (Amendment) Order 1978' (SI no. 1978/126), available from HMSO, price 20p.

Fisons accepts price rule on garden products

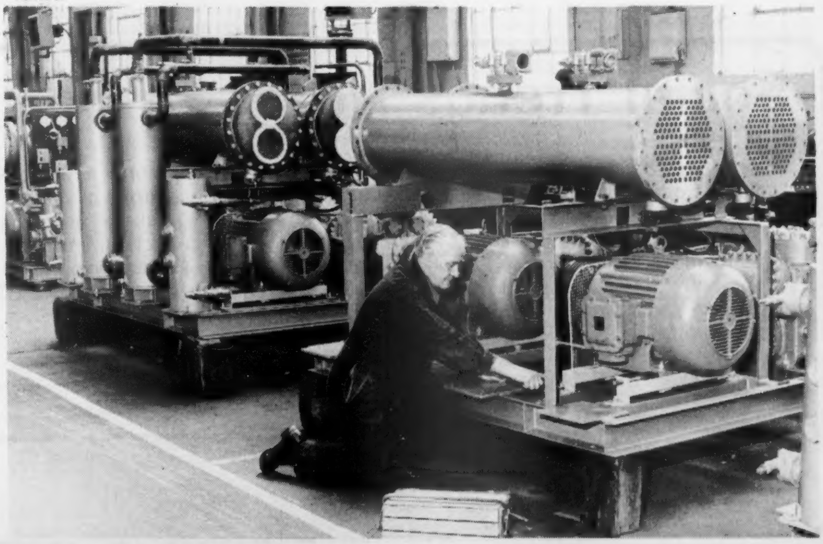
An undertaking by Fisons Ltd to restrict prices of some garden products until 7 September 1978 has been accepted by Roy Hattersley, Secretary of State for Prices and Consumer Protection.

A Price Commission report, Fisons Ltd Agrochemical Division – Agrochemical and Horticultural Products, HC151 HMSO, price 55p, published in January, on its investigation into price increases proposed by Fisons Agrochemical Division, was the first under the new Price Commission powers to recommend some restriction. Fisons agreed to implement its main recommendation after discussions with the Department of Prices and Consumer Protection.

The commission found that, in general, the proposed increases – which included other products for farmers and professional horticulturalists – were justified, but that they had been weighted too heavily on to garden products. The commission recommended that no increase on listed products should be greater than 20 per cent.

Newman motors fitted in refrigeration units

Newman electric motors being fitted to special ship-board nuclear refrigeration units at the works of Lightfoot Refrigeration Ltd of Wembley. Each is powered by two Newman 41 kW TEFC motors and four such units are being supplied by Lightfoot to British Nuclear Fuels for cooling duties on a specially converted ship for transporting radio-active materials between Japan, the UK and France.



Schoolchildren introduced to engineering work

Five of the 12 teenage boys and girls all from different independent schools around Britain who took part in a recent three-day course, 'Introduction to careers in engineering', pictured at the Cleveland engineering group of Head Wrightson and Co Ltd. The 12 were chosen from over 40 applications. Co-ordinated through the Independent Schools Careers Organisation, the group was introduced to trainee and graduate engineers as well as to shopfloor employees and a variety of work. Visits included a steel foundry, a drop forge, research and development facilities, a design and construction company and a manufacturing company.

NEB appoints chairman of Fairey Holdings

Angus Murray has been appointed chairman of the board of Fairey Engineering Holdings Ltd, which is a wholly owned subsidiary of the National Enterprise Board and is the new holding company for those Fairey Group companies purchased by the NEB at the beginning of January 1978.

Official appointments

North-Western Electricity Consultative Council: Roy Hattersley, Secretary of State for Prices and Consumer Protection, has appointed Richard Bragg, David Clusky, Councillor Eric Selby and Frank Welsh as members of the North-Western Electricity Consultative Council until 31 May 1979.

Merger proposals cleared

Roy Hattersley, Secretary of State for Prices and Consumer Protection, has decided, on the information at present before him, not to refer the following proposed merger to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973:

British Steel Corporation and the Graham Wood Steel Group Ltd.

Patents endorsed 'licences of right'

Under section 35 of the Patents Act 1949 the following patents were endorsed 'licences of right' on the date specified.

25 January 1978

1074867 Ford Motor Co Ltd
Motor vehicle suspension
1145238 Ford Motor Co Ltd
A rigid axle suspension system
1154293 Ford Motor Co Ltd
Threaded fastener
1160393 Ford Motor Co Ltd
Change speed transmission
1160943 Ford Motor Co Ltd
Improvements in carburettors
1170614 Ford Motor Co Ltd
Internal combustion engine
1177275 Ford Motor Co Ltd
Electrical wiring assemblies
1178331 Ford Motor Co Ltd
Change speed transmissions
1181930 Ford Motor Co Ltd
Method of producing a shell moulded casting
1185009 Ford Motor Co Ltd
Electrical terminal
1188495 Ford Motor Co Ltd
Multiple ratio power transmission mechanism with two simple planetary gear units
1194179 Ford Motor Co Ltd
Control valve system for a multiple ratio, power transmission mechanism
1197145 Ford Motor Co Ltd
Surface scanner system
1200044 Ford Motor Co Ltd
Change speed power transmission mechanism
1201214 Ford Motor Co Ltd
Overhead camshaft internal combustion engine
1212411 Ford Motor Co Ltd
Motor vehicle suspension
1212412 Ford Motor Co Ltd
Variable rate leaf spring suspension
1212653 Ford Motor Co Ltd
Automotive vehicle driveline
1227411 Ford Motor Co Ltd
Radiation curable modified polyepoxide paint and process for use therewith
1238153 Ford Motor Co Ltd
Internal combustion engine
1241157 Ford Motor Co Ltd
Electrical connector
1242360 Ford Motor Co Ltd
Switch arrangements in motor vehicles
1251015 Ford Motor Co Ltd
A motor vehicle having a ventilation system
1263061 Ford Motor Co Ltd
Improvements in or relating to electrical connectors and terminal contacts therefor
1277551 Ford Motor Co Ltd
Throttle linkage for an internal combustion engine
1323855 Ford Motor Co Ltd
An intermediate plate for assembly between engine and gearbox in motor vehicles
1353418 Ford Motor Co Ltd
Flexible couplings
1371842 Ford Motor Co Ltd
Otto cycle fuel-injection internal combustion engine

Social Trends No. 7

Social Statistics are a vast topic; analysing the data available from the numerous sources can prove a formidable task. *Social Trends,* compiled by a team at the CSO from data supplied by all government departments, is well-established as the source of a comprehensive collection of major social and environmental statistics.

Social Trends No 7 is larger than ever, incorporating not only new tables and charts in the established sections but also a new section on households and families. The calendar of events is a continuing feature which summarises changes in law and other significant events which have influenced social patterns in recent years. The Social Commentary – another established feature – examines social class differences in British society. **£6.90 (£7.44)**

Government publications can be bought from the Government Bookshops in London (post orders to PO Box 569, SE1 9NH).
Edinburgh, Cardiff, Belfast, Manchester, Birmingham and Bristol, or through booksellers.

HMSO BOOKS

1371843 Ford Motor Co Ltd
Internal combustion engine
1372507 Ford Motor Co Ltd
Mechanical torque sensor
1387377 Ford Motor Co Ltd
Internal combustion engine having spark timing control systems
1407927 Ford Motor Co Ltd
Motor vehicle bumper assembly
1409141 Ford Motor Co Ltd
Internal combustion engine spark timing control
1423098 Ford Motor Co Ltd
Fuel vaporiser for an internal combustion engine
1426151 Ford Motor Co Ltd
Motor vehicle seat belt system
1427278 Ford Motor Co Ltd
A cooling fan assembly for an automobile
1431523 Ford Motor Co Ltd
Means to prevent filling of a container except under certain conditions
1445234 Ford Motor Co Ltd
A ventilation and heating system for motor vehicles
1453763 Ford Motor Co Ltd
Fuel vapour emission control device for motor vehicles
1427854 Nathan Poritz
Improvements in writing implements
1464815 Gruko Konstruktionen GmbH
Boring tool assembly
1486813 ITT Industries Inc.
Monolithic integrable bistable circuit

Any person who claims that the patentee at the time of endorsement of any of the above patents was precluded by a contract in which the claimant is interested from granting licences under the patents may apply for cancellation of the endorsement on patents form 45 within two months after the date of endorsement.

I. J. G. Davis, Comptroller

Government sales

25 February 1978 – Furniture

Location
RAF Lindholme, nr Doncaster, S. Yorks

Auctioneers
Bartle & Son (Dept. L), 52 Merrion Street, Leeds 2 (0532 450898)
The sale is of small or single item lots of household furniture.
Catalogue price 20p postage 10p

1 and 2 March 1978 – Miscellaneous

Location
Post House Hotel, Herbert Walker Avenue, Southampton

Auctioneers
Austin & Wyatt (Dept. L), 79 High Street, Fareham, Hants (0329 234211)

Stores lying at Woolston and other depots in the south of England including clothing, furniture, household effects, engineering equipment, MT spares and tyres and other items.

Catalogues which give details of the lots, conditions of sale, viewing times, etc, are available from the auctioneers from two weeks before and up to the day of the sale, price 40p, postage 15p (postal orders only).

Letters to the Editor

Letters to the Editor should be addressed to the Editor, *Trade and Industry*, Room 437, 1 Victoria Street, London SW1H 0ET, and *not* to HMSO.

Particulars of dealers in securities and of unit trusts

The following changes have taken place in parts 1, 4 and 5 of the 1977 edition of 'Particulars of Dealers in Securities and of Unit Trusts' published in May under the Prevention of Fraud (Investments) Act 1958:

PART 1 HOLDERS OF PRINCIPAL'S LICENCES

Name	Nationality or country of incorporation	Address
ADDITIONS		
Connaught Latham Ltd	Great Britain	83/97 High Street, Marlow, Bucks SL7 ABT
Company Developments Ltd	Great Britain	15 Station Road, Solihull, Warwickshire B91 3TG
Scottish United Investors (Management) Ltd	Great Britain	37 Renfield Street, Glasgow C2 1JU
Merrill Lynch Government Securities London, Incorporated	USA	3 Newgate Street, London EC1A 7DA
CHANGES OF ADDRESS		
Hambro Finance Europe Ltd		51 Bishopsgate, London EC2P 2AA
Tate and Lyle Share Shop Ltd		Sugar Quay, Lower Thames Street, London EC3R 6DQ

CHANGES OF NAME	TO
Hambro Mitsui Ltd	Hambro Finance Europe Ltd
London Multinational Bank Ltd	Chemical International Bank Ltd

PART 4 EXEMPTED DEALERS including TRUSTEE SAVINGS BANKS

Name	Registered office, principal place of business or principal place of business in Great Britain
DELETION	
The British Empire Trust Company Ltd	51 Bishopsgate, London EC2P 2AA

PART 5 AUTHORISED UNIT TRUST SCHEMES

Group and/or name and address of management company	Scheme	Trustee
ADDITIONS		
National Westminster Unit Trust Managers Ltd 41 Lothbury London EC2P 2BP	National Westminster Universal Fund	Royal Exchange Assurance Royal Exchange London EC3P 3DN
Schlesinger Trust Managers Ltd 19 Hanover Square London W1A 1DU	Schlesinger Preference and Gilt Trust	Midland Bank Trust Co Ltd 27-32 Poultry London EC2P 2BX

The following change has taken place in the entry for 'Arbuthnot Securities Ltd', in the Scheme column.

DELETE	AND REPLACE BY
Arbuthnot Compound Fund	Arbuthnot High Income Fund

The following changes have taken place in the entry for 'Pension Fund Investment Managers Ltd' (M and G Group Ltd) in the Management column.

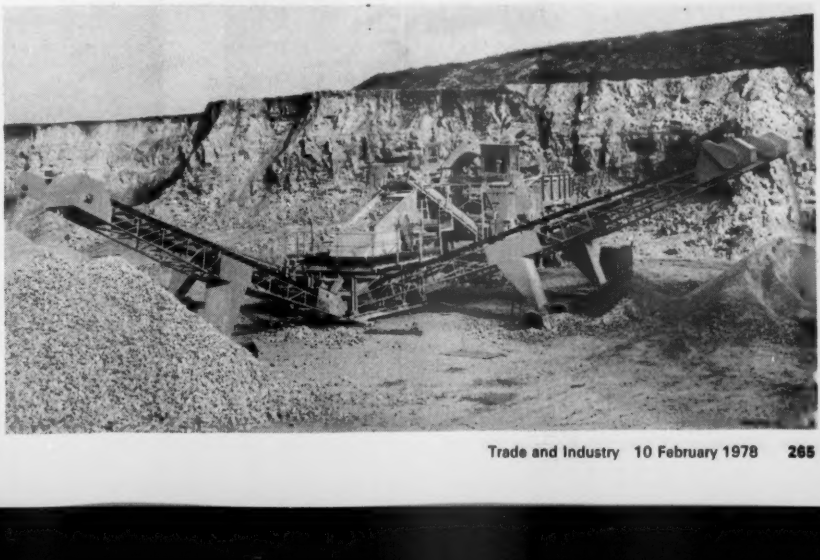
DELETE	AND REPLACE BY
Pension Fund Investment Managers Ltd Three Quays Tower Hill London EC3R 6BQ	M and G Securities Ltd Three Quays Tower Hill London EC3R 6BQ

AMALGAMATION
Arbuthnot Growth Fund Units and Arbuthnot High Income Fund Units has amalgamated with Arbuthnot Compound Fund.

TERMINATION
Arbuthnot Growth Fund Units and Arbuthnot High Income Fund Units will terminate pursuant to its amalgamation with Arbuthnot Compound Fund.

Mobile crusher speeds production

A mobile crusher in south Humberside boosts output of agricultural lime and drainage stone at South Thoresby Quarry, Alford, which Singleton Birch Ltd of Barnetby took over last year. The crusher, weighing more than 50 tonnes and capable of produing 300 tonnes of crushed stone an hour, has been supplied by Frederick Parker Ltd of Leicester.



Customers mean jobs - Edwardes

Plans for stopping the rot in the competitive position of British Leyland's volume production cars were presented by Michael Edwardes to the company's management and employee representatives at Birmingham on 1 February. His objective is to take whatever tough action is needed to restore the company to profitability. He has obtained the support of the British Leyland work force, and its distributors and dealers for the action he is proposing. The following details of his plans are based on extracts from Mr Edwardes speech.

Mr Edwardes' objectives were quite simply to try to restore the company to health so that it could have a profitable business which chipped in at least its fair share of capital for developing the business for the future. Neither this government, nor any other, was prepared to pour in investment capital if the company itself was to make no contribution from its own performance. Only if it had a healthy business would it have security of employment for the majority of people in Leyland Cars. If it tried to make the size of the business line up with the number of people now employed, the business would not survive and the employment of all would be in peril.

The 250 000 vehicles lost last year coupled with very bad quality on many of the cars that were produced had put the whole of the company's car business at risk. Nothing was more damning than the steady decline in market share against a rising market. Was it any wonder that dealers were worried and some were defecting to competitors and strengthening the hold of imported cars in this country, he said.

Even if British Leyland had no disruptions for the rest of 1978 its loss of market share everywhere in the world meant it would not be able to sell more than 819 000 vehicles. And that was assuming a 27 per cent share of the UK market whereas it looked like getting only 21 per cent in January.

Mr Edwardes did not consider the situation was completely hopeless. The reputation of the marque names could still be re-established. He intended that they should be used for all they were worth and that they should form the basis of a new cars structure.

A new company BL Cars Ltd would be formed as an umbrella organisation which would own the assets and be the employing company for cars operation. This decision resulted from strong and logical representations by employee representatives for the need to retain a central unit as a focus for employee relations policies.

Under BL Cars would be created three subsidiary companies: Austin Morris Ltd would have responsibility for the volume range; Jaguar Rover Triumph Ltd would cover the specialist car ranges; and BL Components Ltd would assume responsibility for parts, foundry, the SU/Butec business and the body operations. BL Cars had to have an overall model strategy and the functions of long-term product planning and advanced engineering, those projects between five and 15 years away, would be central activities.

Austin Morris Ltd would have major assembly facilities at Longbridge, Cowley Assembly and Abingdon, as well as powertrain and transmission factories that currently supplied the volume car range. Jaguar Rover Triumph would consist of assembly facilities at Jaguar at Brown's Lane, Coventry, Rover at Solihull, Triumph at Canley and Liverpool, and Vanden Plas in north London. The engine and transmission factories supplying these plants would also be part of the new company. A separate subsidiary company, Land-Rover Ltd, would be established to develop Leyland's four-wheel drive business to meet world-wide demand.

As well as producing cars Austin Morris and Jaguar Rover Triumph would have responsibility for selling them worldwide. Austin Morris would concentrate on the UK and Europe while Jaguar Rover Triumph would build on British Leyland's success in the UK and North America and establish a market in Japan. The main thrust for exports must be to its best markets: Europe, north America and the developing countries where Land-Rover had a large business.

The third company, BL Components Ltd would be created to take over all car component, parts, foundry and body operations. Sections of this business, such as Parts Division and SU/Butec, were profitable and self-sufficient already and their activities as a major supplier both to British Leyland's own models and to other manufacturers would be developed and expanded for UK and export. BL Components would also bring together all the UK body operations at Cowley, Swindon, Llanelli, Liverpool, Castle Bromwich and Dunstable.

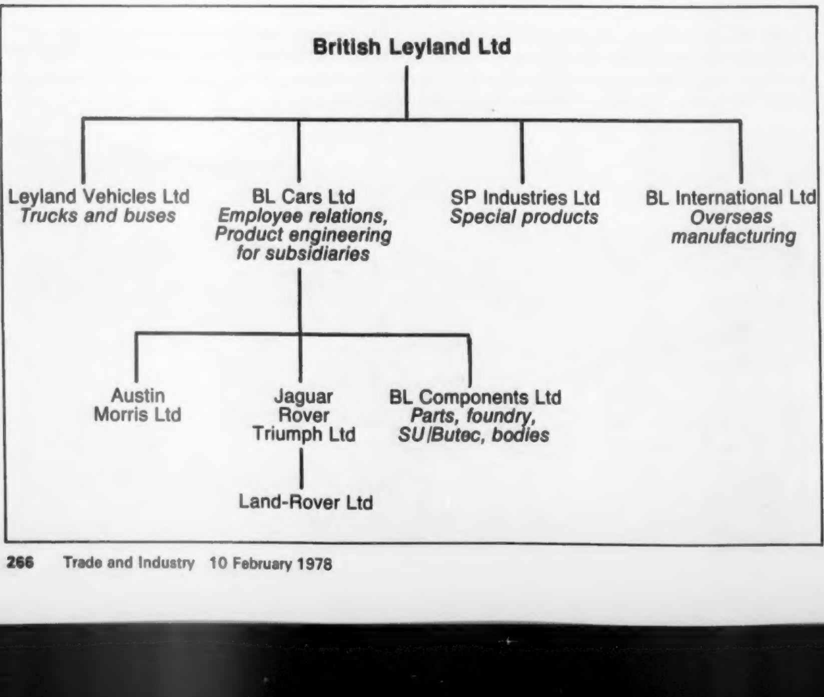
Austin Morris and Jaguar Rover Triumph would not be distracted from their prime objective which was to produce more cars of the right quality and keep producing them. This was why activities not directly concerned with the day-to-day business of making and selling cars would be handled elsewhere in the organisation.

He believed that a company was only as strong as the loyalties of the people who made the products. And the loyalties were to the trademarks, and always had been, and always would be.

The two car companies would be close-knit organisations. But there would not be instant reorganisation. The management of BL Cars would be strengthened very considerably and the new management would be given the task of moving step by step towards the creation of Austin Morris, Jaguar Rover Triumph and BL Components over the coming months. They would be given the whole of 1978 to allow the organisation to evolve. This would enable them to appoint small task forces who could consult and get the benefit of the workforce's experience.

While the company was substantially supporting the Ryder concept of product development, there would be some differences. His board was planning to revitalise the volume car range. The Mini would continue, but a new small car would be introduced to be made alongside it at Longbridge just as soon as was humanly possible. Moving away substantially from the ADO88 concept, the new car would certainly not be a direct replacement for the Mini. It would be more than a Mini in size and in performance. It would not only be larger but it would be quieter and would have quite different driving characteristics.

Of major importance was the mid-car range. This was crucial to the company's fight to hold on to and re-build its market share after these last two disastrous years. A substantial crash programme was needed for updating existing models while a completely new, middle range car was introduced at Cowley. The product position at Jaguar Rover Triumph was a little different. Having developed the new Rover range action was now required to build on the Jaguar standards of performance, refinement,



ride and handling. New models were planned to continue this marque's outstanding success.

These product plans, and others in the longer term, would involve spending hundreds of millions of pounds virtually all of which was to be spent in Britain over the next four or five years. By any standards, it would be a vast figure and when the corporate plan was sent by the BL board to the National Enterprise Board and the government it must have the unqualified support of the workforce to justify the case for the funds.

Mr Edwardes believed the company could persuade government that British Leyland's interests would be better served by approving a structured investment programme, with safeguards and undertakings, that would enable it to plan confidently.

Away from cars in the new structure the Truck and Bus Group would become Leyland Vehicles Ltd. The new company would have overall responsibility for design, manufacture and selling of trucks and buses. It would take over all its own export selling as soon as was practical.

Throughout the past two years, Special Products Group had been profitable. Its diverse activities came under separate companies that already had independent and strong identities, such as Prestcold, Coventry-Climax, Alvis and Aveling-Barford. This would continue and when it became a company special products would be known as SP Industries Ltd.

The other group is Leyland International. Of the highly complex and widespread manufacturing facilities overseas, some wholly owned and some in partnership with government and local interest, a number would continue to be controlled through International, which would become BL International Ltd. A review of overseas operations both in sales and manufacturing was continuing and the company would not hesitate to take drastic action to move out of markets or to close factories where losses were being incurred.

NEB support for Leyland changes

On Monday, 6 February, NEB's chairman Sir Leslie Murphy, said that he was very optimistic about British Leyland's future. 'A very determined effort was being made to make it successful'.

The NEB expected to receive the company's corporate plans for the next four to five-year period in about the middle of this month. It was in agreement with the principle that any financing of the company should be planned on the basis of annual reviews. The next injection of funds would almost certainly be by means of the purchase of additional equity. The board's total investment in British Leyland stands at £247 million. No increase in the government's provision of £1 billion for assisting the company was envisaged.

Mr Edwardes said, on the question of manning, the plain truth was that even at current levels of productivity the company was overmanned and even if these were to remain unchanged, its current market share, and future share based on the most optimistic estimates, it required it to reduce its workforce by at least 12 500. The question was not whether the company should de-man but by how much. The problem had to be tackled by natural wastage, redundancy programmes, by plant closures or by some combination of these.

British Leyland had a major place in the UK industrial scene, Mr Edwardes added. It had been the top exporting British company in the last nine years out of ten. Its import bill for materials was insignificant against its overseas earnings. Each year its exports brought in to this country as much money as the whole of Britain paid out for all Japanese goods: cars, cameras, television and audio equipment.

Taking into account the wage-earners in supplier industries and in British Leyland's distributor dealer network that depend on the company, not just for pay packets, but for investment and future security, there were, said Mr Edwardes, anything up to one million people, men, women and children, whose future could be affected by BL.

'The only chance we have of remaining in business is to achieve the following objectives. We must:

- have the support of everyone in the company;
- build to schedule;
- improve quality;
- justify government financial support;
- make full use of new facilities; and
- get customers back into the showrooms and persuade them to buy British and buy Austin, buy Morris, and Jaguar, Rover, Triumph and MG.'

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Industrial Strategy: from analysis to action

At the meeting of the National Economic Development Council on 1 February, the government, CBI and TUC reaffirmed their commitment to the Industrial Strategy. And after two years' work by the Industrial Strategy sector working parties (SWPs), whose reports were considered at the NEDC meeting, Secretary of State for Industry Eric Varley said that now was the time to translate their analyses and recommendations into action at plant level.

Launched at Chequers in November 1975, the Industrial Strategy sets out to make the UK a high output/high wage economy with an internationally competitive manufacturing base built on a substantial improvement in manufacturing performance. It was envisaged that North Sea oil could provide the time and opportunity for this achievement, but not without a fundamental change in attitudes to manufacturing industry.

The 1975 plan was based on an approach agreed by industry, unions and government designed to feed information upwards from the various sectors of industry into macro-economic planning. During the last two years it has been the function of the sector working parties to provide this sectoral information.

As Chancellor of the Exchequer, Denis Healey explained after the NEDC meeting, the Industrial Strategy programme was started in the worst possible environment 'because we were entering the deepest recession since the 30s and the natural tendency of workers and managers in all industries was to protect jobs rather than increase efficiency. And the fact that we have moved as far as we have in that period I think says something for the enthusiasm of those who found themselves engaged in the work.' But, he said, this new phase took place in one of the best environments that could be imagined, because the British economy was likely to grow faster in the next few years than it had since the war.

Micro-schemes

At the NEDC meeting Mr. Varley announced a further allocation of £25 million to the selective investment scheme. Later, in an interview on Radio 4's *Financial World Tonight*, Mr Varley pointed out although that for the last two years the government had been operating in a very difficult environment of world recession and high inflation it had been able to bring forward micro-schemes – the various foundry schemes, machine tools and product development.

'Now we think that we've brought forward, in government, enough assistance at this stage'. Government would bring forward some more, he said, but 'now what we want to see is the analysis that's been carried through by the sector working parties implemented at the level of the firm'. It was crucially important, he said, to get the Industrial Strategy message down to the level of the firm.

Improving performance

On improving performance, Mr Varley said: 'We mean continuity of production, not so many stoppages; we mean product development identified at the level of the plant; we mean proper marketing and follow-up arrangements; and all the other things that our competitors have been doing for many, many years.

'Our economy has been characterised by low performance, low productivity. low investment and low wages and we've got to get the reverse of all of those'. Then, he said, 'what we shall have, I believe, is perhaps not a rapidly appreciating currency, but a currency which won't depreciate in the way that's made up for some of the problems of British industry over the last few years'.

Below we publish extracts from a report by the Industrial Strategy Staff Group on the main points made by the sector working parties and from a memorandum by the Chancellor of the Exchequer and the Secretary of State for Industry representing the government's response.

The SWP findings

Extracts from a memorandum by the chairman of the Industrial Strategy Staff Group

Objectives

Trade: 16 out of 37 SWPs have so far agreed objectives for a share of world trade. Nine expect an increase by 1980-81; five aim to maintain their share; two foresee a slight decline. Fifteen further SWPs have objectives which are aimed at improving the balance of trade within their industrial sector.

Output and labour productivity: objectives available on output growth (covering SWPs which account for about three-quarters of SWP output) suggest a very substantial improvement in the period 1975-80 to a little over 4 per cent per annum from the very low rate achieved in 1971-76 (under 1 per cent pa). Possible labour productivity growth is less spectacular but is still a significant improvement on recent trends (from about 3½ per cent pa 1971-76 to perhaps 4½ per cent pa 1975-80). But only about half the SWP so far offer any kind of objective in terms of productivity.

Employment: impressions of the resulting effect on employment have to be based on SWPs which cover only about half the employees in all SWP sectors. It appears that in these sectors as a whole employment is likely to decline slightly over the period from 1975 to 1980, although this reduction would be a great deal less than the fall which has already taken place between 1971 and 1976 . . . The achievement of the market-share objectives could mean an increase in employment in some of these sectors from now to 1980.

Export and imports: aggregation of export objectives can be based only on reports covering rather over half of all SWP exports. In these industries SWPs were considering export volume growth rates for 1975-80 at a little under three times the 3½ per cent pa for 1971-76. A similarly restricted number of SWPs has suggested little or no further growth in imports in constant prices from 1975-80.

Balance of trade: together these trade objectives result in a gross improvement in the trade balance of around £2½ billion at 1977 prices. This is slightly smaller than what was implied by 1976's reported objectives. However, SWPs are still aiming at substantial and sometimes spectacular improvements in trade performance although the international trading environment is not now expected to improve as much as was then thought.

Resource implications

Manpower: most SWPs expect to meet their market-share objectives with little or no increase in employment and several expect a decline. Most of the SWPs which predict an increase in total employment, if output objectives are met, say it will be small.

On balance, the overall change is expected to continue to be in the direction of a greater proportion of non-manual workers (including technicians and professionally qualified personnel) with a reduction in the proportion of the less skilled.

Plant capacity: in some sectors existing capacity which may not be fully needed at present will have to be increased by 1980 if the SWPs' output objectives are to be achieved.

Other SWPs emphasise the need for changes in the type as well as the volume of capacity . . . New plant will be needed because modernisation and new developments in production technology must be applied if the sectors are to remain competitive.

Some SWPs report significant under-utilisation of existing capacity and believe that it will be sufficient to meet the 1980 output implied by their market-share objectives.

Overall, it appears that there will be some sectors where there will be increases in capacity to produce new products, to benefit from modernisation and to meet future demand. However, in a number of other sectors, the likelihood is of continued over-capacity and the possibility of meeting market-share objectives with existing capacity.

Energy, construction and transport: at this stage, most SWPs foresee little or no major implications for energy, construction and transport as a result of their attaining their 1980-81 objectives. A few add that more work is needed to arrive at conclusions.

Strategic opportunities for the UK

Product technology and product range: SWPs see opportunities to build on existing UK technological advantages. They arise from the attractiveness of the UK as an R and D centre and from product and technological strengths in a wide range of manufacturing industries.

SWPs also see major opportunities in extending their particular industry's product range to offer goods already available on the world's markets but not sufficiently well represented in the UK product range. Examples of these are some chemical intermediates and certain types of office machinery. In some cases, a prompt and vigorous effort will be needed to match competitors' quality or their efficiency in the manufacture of these products. Inward investment or joint ventures with UK companies is seen by some SWPs as potentially helpful. Others emphasise the importance of a strong consultant engineering activity in this country.

Some SWPs report market opportunities for efficient component and equipment suppliers particularly where the UK range of products is limited or inflexible. Examples are the unsatisfied demand for certain types of foundry equipment, components and automated production lines.

Electronic and engineering SWPs point out that the challenge of more sophisticated products and production methods is placing more of the design work and value added with the component supplier. This emphasises the need to ensure that UK component manufacturers are internationally competitive.

Raw material advantages: in some sectors opportunities for UK industry are linked with the exploitation of raw material advantages. SWPs are considering ways of adding value in the UK to North Sea oil and gas feedstocks and have noted the possible long-term use of coal as a source of chemical feedstock. The expansion of UK milk production could permit further import substitution of cheese and butter and the greater use of recycled waste paper could reduce imports of wood pulp.

World markets: despite the current recession, the majority of SWPs report good opportunities in major industrial markets. Some arise from harmonisation of standards or convergence of consumers' tastes. Opportunities are also seen in agriculture, public utilities, transport and infrastructure requirements, overseas rather than in the home market and especially in the less developed countries. The rise in oil prices has created special opportunities for mining machinery and accentuated the trend towards diesel engines.

SWPs urge their industries to scale their manufacturing and selling operations to world rather than UK markets. In some cases, only exploitation of overseas markets will provide room for growth in industries which already have a big share of the UK market and/or foresee low growth of demand at home and, therefore, must win a greater share of world markets to achieve satisfactory increases in output and employment.

SWPs emphasise the opportunities to improve the effectiveness of marketing in UK companies, including after-sales service and participation in multi-sector projects. In some a total 'systems' approach in the product range offered is essential. It is reported that great improvement can be made if firms devote more resources to attacking selected markets with concentration and persistence.

It is widely accepted that, at present, a minority of firms in each industry provides the effective export effort. But SWPs emphasise that more individual companies should start to sell overseas in a committed professional way, though their efforts will probably have to develop gradually from a limited selective start.

Most SWPs have defined their sectors' opportunities in geographical as well as product terms and considered the best way of approaching the priority markets. Western Europe is the region most frequently mentioned as an opportunity area but some SWPs see their best opportunities as lying outside Europe, ranging from the USA to Comecon, Opec and developing countries.

SWPs see opportunities in the EEC. Some emphasise the need for a systematic effort and high quality goods, eg classical knitwear and sophisticated engineering products. Harmonisation of standards and procedures throughout the EEC is expected by some SWPs to yield benefits but this is expected to be a slow progress.

Import substitution: SWPs have identified substantial opportunities to replace imports by changes in product range.

SWPs put great emphasis on contact between buyer and seller sectors, within manufacturing industry or across the manufacturing/retailing boundary, and on identifying the products which are or might be imported, the reasons for imports and the actions necessary to encourage the use of UK products. Sometimes product development is needed, sometimes there is scope to improve marketing, ordering, scheduling or call-off arrangements.

Constraints

Manpower skills: current output levels are generally low and there is little or no indication of overall labour shortage in any sector. However, even at present levels of output about half of the SWP reports indicate that there are, at the moment, shortages of varying intensity in key occupations among the skilled manual engineering workers; these include fitters, setters, welders, electricians, and toolmakers. There are extensive difficulties in recruiting skilled engineering manpower in the south-east. In addition, shortages of certain qualified employees (including chemical, production and other qualified engineers and draughtsmen) are especially mentioned.

Pictured after the NEDC meeting on 1 February, left to right, Eric Varley, Denis Healey and Bernard Asher, acting director-general of NEDC.

Several sectors including some which do not report labour shortages at present foresee shortages of skilled manual and non-manual workers in the future.

Many of the reports about skilled labour shortages have been referred to the DE and Employment Service Agency who have set up arrangements to identify specific shortages and bring to bear available services for dealing with them locally.

Productivity: 14 SWPs now have, or are about to set up, productivity or manpower sub-groups to examine in detail ways of improving company performance. Activities of some SWPs have included attitude surveys, plant meetings at factories to encourage firms to form their own productivity action groups, and a comparative study of UK plants which emphasised the value of well-defined systems of production control and planning.

Members of other SWPs have visited plants and held discussions on the Industrial Strategy with management and employee representatives.

SWPs have pointed to the relationship between higher productivity or flexibility and improved security of employment. For example, one has suggested that the tentative employment target, implying an overall contraction in the labour force, should be achievable alongside guarantees of secure employment for existing employees. Reducing the differences in the employment conditions between manual and non-manual workers is mentioned as an important factor in securing consent to changes designed to secure improved performance.

Supply constraints: some SWPs, especially in the engineering sectors, refer to the constraints caused by domestic components supply. These are likely to be a major impediment to growth in some sectors and an encouragement to greater imports, which are likely to grow with an upturn in the economy.

A shortage of domestic components is frequently blamed for late delivery which can be particularly severe at times of increased demand.

Uncompetitive UK prices are mentioned for some types of organic and inorganic chemicals as a constraint in domestic purchase . . . There is special emphasis by some SWPs on the need for quality improvement in some components.

Plant utilisation: SWPs comment on the need for improved methods and planning processes.

Rationalisation and modernisation is occurring aided in some sectors by government assistance.

The need for more product/production rationalisation: some sectors have products which are obsolescent or oriented to small or slow-growing markets, others have gaps in their product ranges, or product ranges which are too wide; some individual firms' ranges overlap excessively or the industry as a whole is diffusing its efforts.

In certain sectors, unit costs need to be reduced and margins improved by achieving economies of scale.

Others say that it is hard for the UK industry, or the UK-owned part of it, to match competitors in the USA, Japan, Scandinavia, etc in the volume of output or R and D effort. Product changes are adding to the pressure – eg the increasing use of electronic technology has brought US-based computer and electronics companies into the printing machinery field, where they strongly compete with the established firms. But SWPs see multi-national companies as potential assets to their sectors, because of the product and process strengths which they can contribute.

Public purchasing: SWPs are concerned about the effect of sharp variations in public expenditure on capital equipment manufacturing industries. Some recommend a long-term rolling programme for public sector expenditure and counter-cyclical investment policies.

SWPs endorse for their industries the scope for increasing export potential by further co-operation between nationalised industries, their suppliers and overseas consultants.

SWPs with major public sector customers ask for changes in policy on progress payments, retention monies, the settlement of claims and current practice on nominating sub-contractors.

Other aspects of public policy: many engineering SWPs urge the speedy implementation of the Warner Report. ('Standards and Specifications in the Engineering Industries').

SWPs report the need for continued efforts to simplify and harmonise UK product testing and accreditation arrangements for testing houses and increasing their international acceptability.

There are strong criticisms of the inconsistency of decisions made by individual Health and Safety Executive inspectors in respect of compliance of machinery with safety requirements.

Authorities are asked to implement anti-pollution measures with flexibility and to allow a reasonable time for compliance.

The chemical industry comments on delays caused by planning procedures and difficulties in securing new sites for chemical plants.

Some SWPs point to the difficulties in obtaining forecasts of demand from publicly-owned industries, and about delays in the provision of adequate analysis of import data.

Development of overseas competition: SWPs call attention to the resistance to UK exports which will increasingly follow the development of local assembly operations and then local manufacture and competition in the world markets.

Japanese competition, present and expected, is a matter of concern to a number of sectors. Only one SWP includes Japan in its list of markets for priority consideration.

Anti-dumping cases are in preparation in some sectors. Concern about the effect of transferring responsibility for anti-dumping action to the European commission has been met both by assurances sought and received, by HMG and by the maintenance of a strong anti-dumping team to advise UK industry and assist the commission.

Industrial Strategy: from analysis to action

The SWP findings *continued*

SWPs also recognise the need for commercial responses to low cost competition at home and abroad basically efficient adaptation to market needs.

Finance

The SWP reports indicate generally that, given an improvement in profitability, their sectors should be able to generate or attract the finance needed to achieve their objectives . . . Certain anxieties are present and this section covers special areas of difficulty.

Some SWPs still feel the need for improved institutional arrangements for raising medium and long-term finance.

Difficulties may also arise where profitable firms wish to expand their business rapidly. Problems are foreseen in raising suitable external finance for smaller firms. It is reported that British firms have difficulty in obtaining bank finance for longer-term ventures on terms as good as those offered in some other countries.

Finance for market penetration: the costs and risks associated with overseas market penetration continue to provoke comments from a number of SWPs.

The particular aspects of overseas finance which continue to give difficulties include:

- financing large-scale projects;
- providing long-term risk capital in order to invest in distributor support, service and spares facilities;
- supporting tendering costs and feasibility studies;
- obtaining pre-shipment finance;
- cost of working capital.

Credit insurance and finance-facilitating guarantees: a number of SWPs draw attention to the difficulties they experience in financing the gap between contract and shipment for export orders . . . SWPs ask whether ECGD could advance progress payments when neither the customer nor the banker will do so.

Some SWPs urge that thresholds for ECGD facilities should be reduced to enable firms which cannot obtain bonding without ECGD support to do so. Also, there are requests to make cost escalation cover more attractive, and to increase the permitted foreign content of export contracts.

In the area of credit insurance and finance-facilitating guarantees, a number of SWPs say that ECGD procedures should be quicker and more flexible, particularly in connection with developing countries.

Problems associated with sterling appreciation: SWPs are concerned about the effect of an appreciating exchange rate on their profit margins and cash flow.

Firms themselves can help to compensate for exchange rate effects by improved performance in product design, production quality and delivery.

Recent events have shown that there may be limits to the government's ability to maintain a given level for the exchange rate.

Smaller firms: many SWPs say that smaller firms find it harder than others to obtain almost any kind of finance. Finance for R and D and marketing finance are both mentioned as specific areas of difficulty.

Communications

SWPs have been concerned in varying degrees to communicate their specific findings and proposals to their respective industries and obtain the necessary commitment and (above all) action at the level of the firm. Some SWPs are holding back until they have something more definite to say.

However, the majority are using a variety of methods. Most SWPs' end-1976 reports have been published and widely distributed mainly through management and trade associations and in a number of cases through trade union machinery as well. Popular versions of the reports and newsletters, etc on the strategy generally and on particular parts of their work have been issued by some SWPs.

Written communication of this sort can make only a limited impact. All levels in the firms – even in management – are not always aware of the work of the SWPs. Feedback, evidence of discussion and reaction in the firms are often slight. SWPs have, therefore, arranged, or are planning, presentations of different types – visits by the chairman and/or Nedo staff or members of the SWP, meeting, with groups of chief executives, conferences on special themes (which often involve many people outside the SWP or even the industry), meetings with customer industries' SWPs and stockholders. Office staff have given talks and presentations to trade unions and trade associations or other similar audiences.

SWPs have also been organising or using existing conferences, seminars, etc to discuss particular topics . . . Discussions at the level of the firm or the factory have been organised by some SWPs and films and press articles have also been used.

The most highly structured effort has been made in the clothing and textile area, where attempts are being made to develop a major programme of visits to firms to explain the work of the Industrial Strategy and discuss the firms' response to the strategy.

Two joint ECGD/Nedo seminars on credit insurance and export finance were held in July 1977. The proceedings were published and have formed the basis for discussions with the financial community.

SWPs realise that in 1978 greater efforts must be made to communicate the work of the Industrial Strategy and most of them expect to have further progress to report. Some SWPs say that they still have to devise an effective 'package' programme of communication.

The government's view

Extracts from a joint memorandum by the Chancellor of the Exchequer and the Secretary of State for Industry

Economic prospects

The economy is now emerging from a long period in which there has been no net growth of output, and personal living standards have fallen – a most difficult environment for launching the Industrial Strategy . . . The recovery from the recession has been hesitant and insufficient to stem the rising tide of unemployment.

In spite of this, considerable progress was made last year in carrying through some essential changes in Britain's economy. In particular the financial imbalances that had proved so disruptive in 1976 were corrected. The current account of the balance of payments moved into surplus, helped not only by the increasing flow of North Sea oil and an improvement in the terms of trade but also by a significant rise in the volume of exports. The rate of inflation fell rapidly. Confidence returned to the financial markets and was reflected both in lower interest rates and a stronger pound. Towards the end of the year there were signs also of a recovery in consumer and business confidence.

The rate of growth that the economy can sustain over the next few years will be determined largely by developments in three areas: the level of world trade, the competitive performance of British industry and our domestic inflation rate.

World trade has recently been depressed. In 1977 it grew at less than half its post-war average, and the latest OECD forecasts suggest only a relatively modest recovery this year. It is now widely recognised that there must be concerted efforts to raise demand if we are to turn the tide of unemployment. The persistence of exceptionally high inflation in some countries and widespread imbalances of trade and payments however, make it unlikely that world trade will quickly return to the sort of growth seen in the decade before the oil price rise. On present prospects, trade in manufactures might grow, on average, by around 8 per cent a year over the period 1977-83. Though this would represent a marked recovery from recent levels, it would be well below the trend rate of about 10 per cent experienced in the 1960s and early 1970s. The British government will use every opportunity to encourage a higher growth in world demand as the only means of restoring a higher growth in world trade.

The likelihood that the growth in world trade may be relatively sluggish makes it crucially important for British industry to improve its competitiveness. This is not something that government can do for industry. North Sea oil will make it more difficult to use the exchange rate as an instrument to achieve the desired degree of competitiveness . . . Though North Sea oil will strengthen Britain's balance of payments, it will not allow the economy to run an adequate current account surplus at full employment unless there is a marked improvement in industrial efficiency.

Over the past four years there has been virtually no growth in productivity . . . Plainly, much of it is cyclical and associated with the low levels of demand; but there are some grounds for thinking that the enormous increase in energy prices in 1973 and the low levels of investment in recent years may have reduced the underlying growth of productivity. To make good this damage will require that an increase in domestic demand is accompanied both by a substantially higher level of new investment and by a determined effort to use our existing productive resources more efficiently. In the meantime, even allowing for the faster growth of labour supply and for the contribution made by the rising output of North Sea oil it seems unlikely that the growth of the economy's productive potential will exceed its past average of about 3 per cent a year.

The economy, however, is at present working well below capacity. This should permit for a period a rate of growth above that of productive potential, together with a steady fall in unemployment. The extent of this slack, and the pace at which it can be safely taken up, is not easy to determine. The unemployed capacity – both of labour and plant – is unevenly distributed, and past experience suggests that there are physical constraints on the pace at which manufacturing output can grow without producing over-heating in some sectors. Such overheating is liable to lead to higher inflation and a worsening of the trade balance, with all the consequences which this has for investment and for employment. What we need is a rate of growth which is steady and sustained.

The moderation of pay increases under phases 1 and 2 of the pay policy has brought our rate of inflation closer to that of our main trading rivals, and this in turn has provided the pre-condition for expanding our economy . . . If pay increases are moderate we should be able to sustain a rate of growth significantly above 3 per cent a year, and so achieve a sustained decline in unemployment. Excessive pay increases would put all this at risk. Their adverse effects on confidence, interest rates and competitiveness would at the same time reduce economic activity and make it impossible for the government to offset the fall in activity by itself stimulating demand.

We can make only highly conditional projections of the medium-term growth of the economy. But given an annual growth in world trade of around 8 per cent, a level of pay settlements in future rounds well within single figures and a small improvement in industrial performance, it should be possible for the UK economy to grow by about 3½ per cent over the next few years. Such a growth rate should bring about a steady reduction in unemployment. A substantial improvement in our industrial performance however would enable us to sustain a growth rate above 3½ per cent and to bring down unemployment that much faster.

Implications of SWP objectives

The SWPs aim to achieve ambitious improvements in their sectors' share of home and overseas markets. Most of them see an improvement in productivity as the essential means of achieving their market share objectives . . . Though they aim to increase their output substantially, success in this objective is unlikely to result in any significant increase in employment in these industries. On the other hand, if they fall short of their productivity targets, they will fall short of their market share and provide less output and employment. Failure to achieve the market share objectives will also mean less improvement in our underlying balance of payments, and therefore less scope for expanding the rest of the economy.

The improvement in the balance of payments through better trading performance should allow the government to reflate the economy more rapidly and thereby to raise employment in the economy as a whole.

About half the SWPs have quantified their objectives for exports and imports, and these imply an improvement in the trade balance for their particular industries of about £2½ billion (at 1977 prices) between 1975 and 1980. Simulations conducted by Treasury economists suggest that if the government could count on a £2½ billion improvement in the trade balance in 1980 and allow the current account to deteriorate by a corresponding amount, something of the order of half a million to 1 million jobs could be created by that year through the faster expansion of the economy.

The work of SWPs

In their earlier reports the SWPs addressed the majority of their recommendations to government. This reflected the impact of government policy on all aspects of industry and constituted a test of the government's commitment to the Industrial Strategy. We accepted it as such and within the constraints to which all governments are subject we have sought to meet the needs identified by the SWPs.

- Changes have been made in our fiscal policy to increase incentives and improve differentials;
- Further substantial funds have been made available to assist industry to invest, through the selective investment scheme, the product and process development scheme and several special industrial schemes;
- A number of measures have been introduced to assist small firms, notably through relieving their taxation burden and setting up the market entry guarantee scheme;
- A wide range of ECGD facilities has been substantially improved;
- Government training facilities have been greatly improved and substantial extra funds made available for training within industry;
- The government's wider policies have been reviewed to see if they should be amended to take account of industrial priorities.

Government support for the strategy work

In addition to measures already taken the government is prepared to add significantly to the resources available to help SWPs through the selective investment scheme, assistance of £25 million has already been approved for investment projects worth £250 million. These should lead to: the creation of 2500 permanent jobs, the safeguarding of a further 4700 jobs, and the provision of 20 000 man-years of work through orders for the construction and plant and equipment industries; an annual benefit to the balance of payments of £150 million from 1982.

About 25 per cent of these projects will help to relieve potential bottlenecks in vital supplies to UK industry. A further 119 projects costing £1,200 million are under consideration. Further applications are flowing in at such a high rate that it appears likely that the £100 million allocated to the scheme will be insufficient to meet investment needs. Consequently, the government has decided to provide a further substantial allocation to this scheme.

In recognition of the resounding success of special industry schemes, the government proposes to allocate substantial funds to a growth sector – microelectronics in the semi-conductor area and microprocessors. The relevant SWPs and firms are being consulted on the nature of the scheme at present and details will be announced shortly. The government will consider sympathetically proposals for extending similar help to other growth sectors and will consult relevant SWPs as appropriate . . .

The government's competition policy makes an important contribution to promoting efficiency and competitiveness in UK industry in line with industrial strategy objectives. We are carrying out an interdepartmental review of competition policy, and in the light of this we propose to circulate a paper for discussion by the council, assessing the scope for changes to ensure that competition policy makes its full contribution to the success of the Industrial Strategy.

Future work of SWPs

SWPs' primary job until now has been analytical. They have had to collect and analyse complicated sectoral data, reach conclusions about constraints and opportunities, propose targets and begin the formulation of sectoral strategies . . . In this paper we have emphasised the need to improve productivity, and many SWPs have already identified this as the key to increasing their sector's competitiveness . . . Even after identifying what needs to be done, in this and other areas, SWPs will have to persuade individual companies within their sectors to adopt these strategies in pursuit of sectoral improvement . . . The right way to tackle this will depend on the message to be got across:

- SWP views on prospects and opportunities need to be brought to the attention of the managements and workforce concerned. Trade associations and trade unions can help in this;
- Where SWPs have worked on problems that directly affect managers and workers in individual plants – notably on the scope for improving productivity – they may wish to find some direct means of communicating this . . . These and other means of communication are expensive in resources, and the government has made available an additional £250,000 on the Nedo budget for this purpose;
- Some practical matters (investment, product development) are commercially sensitive and unsuitable for detailed discussion in the SWP, but may need to be discussed between individual firms and their sponsoring departments, within the framework of the SWP projections. Such discussions are already going on in the five priority sectors and elsewhere but again more effort may be needed here, especially in growth sectors. For the strategy to be effective, all concerned will need to bring its lessons to bear at the level of the individual firm and even plant . . . It will be for companies concerned to decide how best to consult their workforce on the forward plans which will be the subject of these discussions;
- These detailed discussions will be more effective, and the SWPs themselves will have more momentum, if the Industrial Strategy becomes more widely known to the general public. This is a job for all the parties on the council.

Conclusions

On the basis of the work done so far there is a real prospect that the Industrial Strategy will make possible the necessary improvement in our trading performance. We recognised two years ago that we would not be able quickly to achieve the results for which we hoped and that there would be moments of disillusion and impatience. We knew then that we were embarking on a long-term programme for reversing a long-term industrial decline. We knew that we would have to persevere or suffer the consequences of our failure. We invite the council to reaffirm its commitment to the Industrial Strategy and to endorse the continuing work of the SWPs.

CBI support for better communications

Full CBI support for NEDC efforts to promote better communications as part of the Industrial Strategy programme (see opposite) was promised by John Hedley Greenborough, president of the CBI.

In a formal statement on the CBI's position on the development of the Industrial Strategy on 1 February, he said the CBI gave full support to the objectives of the strategy, and to the studies to be undertaken by the sector working parties of the prospects for and problems facing manufacturing industry. 'We welcomed the emphasis which the government gave to the importance of sustaining industry on a sound and profitable basis.'

The SWP reports showed, he said, that there was now a wider acceptance of the need for stable policies to encourage industrial expansion and that a much better understanding of business problems existed between government and both management and trade union representatives at sector level. 'But if the analysis and recommendations in the reports are to have any real effect and if the momentum of the Industrial Strategy is to be maintained, we must bridge the gap between the SWPs and companies in their sectors. This gap is largely one of communication and although some improvement has taken place, much more needs to be done to secure implementation of the SWP work at company and even plant level.

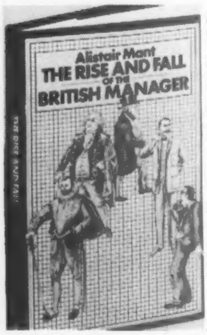
'The CBI is ready to help in this and to encourage discussion of SWP reports by its member companies, where appropriate. We will fully support the efforts of Nedo to promote better communications to the companies concerned and we will generally encourage our members to receive visits from, for example, SWP chairmen and sponsor departments, to discuss relevant SWP recommendations from the viewpoint of the individual company.'

He pointed out, however, that care must be taken to ensure that such visits did not place an undue burden on companies in terms of time and management resources. Trade associations would also want to play an important part in improving communications to their members.

The CBI president also said that CBI strongly believed in the need to involve employees in the Industrial Strategy and would continue to encourage its members to discuss with their employees the contents of SWP reports and their relevance to the company wherever such discussions were likely to be of benefit to that company and its employees. The CBI Employee Communication Unit, which was already deeply involved in the development of effective involvement within companies, had already been in touch with Nedo staff and was ready to help in any way it could.

New publications

Management – a cultural weakness?



Author of the celebrated Mant report on the development of managerial people in mid-career, Alistair Mant now offers in 'The Rise and Fall of the British Manager', a controversial personal account of the state of British management.

He argues that the manager is 'a mythical beast whose very existence is symptomatic of a cultural weakness in our society'. He claims that 'management' seen as a 'professional specialism, a new priesthood', is a 'product of Anglo-Saxon culture' and asks why such a convoluted way of thinking and writing about the homely activity of running things properly was invented.

'The cynical', he observes, 'may even posit a direct correlation between the amount of money spent on management education and development in Britain and the rate of decline in industrial performance'!

In diagnosing attitudes in modern Britain he quotes the universal mood to opt for greater reliance on others for one's welfare, a feature he calls 'dependence'. 'Fight', the reverse of dependence, is no longer directed by us towards the outward goal of establishing trade links and seeking a share of the world markets. Instead it is turned inwards and directed towards ritualised battles between bosses and workers, north and south, left and right, rich and poor.

This book should prove to be interesting reading for all who labour, or propose to, under the designation 'manager'.

The Rise and Fall of the British Manager, by Alistair Mant. Macmillan. 1977. (viii, 142 pages. £5.95. ISBN 0 333 19865 4).

Guarding against risks

Like most things in life, the outcome of a business project cannot be predicted with complete confidence—there will always be a certain amount of risk involved. So it's important to harness all available resources in the company, to keep the risk element to a minimum. Careful planning, co-ordination, and control are essential to ensure that set objectives are achieved within a time limit and a cost budget—responsibilities which fall on the shoulders of the project manager.

Anyone concerned with the industrial planning project may be interested to know that the second edition of 'Project Management' is now available. Highly recommended in its first edition (1968) as an excellent text on the subject, this revision has been substantially expanded to embrace recent technological advances, the emergence of new management techniques and Britain's changed economic position.

The book discusses the merits and shortcomings of project teams in a chapter on project organisations, while reimbursable or cost-plus contracts, which caught on as a result of high inflation rates, are considered in the chapter on cost estimation and price fixing. A completely new chapter is devoted to the use of computers to analyse critical-path networks and allocate resources. Also given separate treatment is scheduling parts (material control), an important area of project management with its own techniques.

This expansion in text (from 9 to 11 chapters) is accompanied by a corresponding increase in the number of illustrations, and all cost figures used in examples throughout the book have been updated. Managers and students alike will find this an invaluable reference work and a useful training text.

Project Management, by Dennis Lock. 2nd edition. Gower Press. 1977. (xii, 260 pages. £7.50. ISBN 0 566 02034 3).

Directing the directors

Now in its second edition, that most useful of reference books, 'The Director's Handbook', edited by George Bull, is now introduced with a foreword from The Duke of Edinburgh. Although broadened in scope to include the UK's role in Europe and as a world financial and commercial centre, the basic objective of this edition, as in the first, is to aid directors and senior executives to fill the gaps which may exist in their business knowledge.

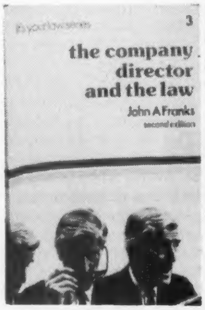
The handbook is divided into three main sections. The first describes the role and function of the company in a commercial and industrial context and the ways in which business interacts with both government and society as a whole. Company management provides the theme for the second section, covering such topics as recruitment and training, advertising and marketing, and public relations. And the handbook is rounded off with a section on the director as a person, from the management of his personal finances to advice on keeping fit.

The list of contributors is impressive, as is the range of topics discussed. But one curious omission is the failure to note the authors along with the article titles in the contents list. Although there is a full list of contributors, it is not possible to match these up with their respective articles without making inspired guesses—we assume, for example, that Len Murray wrote the article on the TUC.

However compensation comes in the form of an excellent index, and a clearly presented text which incorporates expressive chapter titles and headings with an easy-to-read type size. By no means cheap, this handbook is one investment, which, in the right hands, cannot fail to pay dividends.

The Director's Handbook; edited by George Bull. 2nd edition. McGraw Hill Book Company (UK) Ltd. 1977. (xxviii, 773 pages. £14.95. ISBN 0 07 0844 87 9).

Director's law for the layman



It is often argued that company directors are not sufficiently informed about their position under the law. Consequently they may appreciate guidance on the subject, and volume 3 of the Law Society's 'It's Your Law' series, which has just appeared in its second edition, sets out to provide it.

Arranged in a very readable format, without referring to the particular legislation and cases which form the basis of the law, the author provides a useful introductory layman's account of company law.

Directors are informed of their liabilities under the law – personal and corporate. Among the personal liabilities discussed are those for debt and contracts, and the implications of their relationships with shareholders, and their position as members of staff. The dealings of the company are also discussed, with an examination of disclosure in reports and accounts, dealings in shares, trading position and the effect of articles of association.

Now updated, this edition takes into account new legislation including the Companies Act 1976, the Insolvency Act 1976 and the Stock Exchange (Completion of Bargains) Act 1976.

The Company Director and the Law, by John A. Franks. 'It's Your Law Series', volume 3. 2nd edition. Oyez Publishing. 1977. (196 pages; paperback £3.95. ISBN 0 85120 326 4).

Publications and opinions expressed on this page do not necessarily reflect the views of the government. Inquiries and submissions for review should be sent to *Trade and Industry*, New Publications Page, Room LG 17A, 1 Victoria Street, London SW1H 0ET, tel. 01-215 4136.

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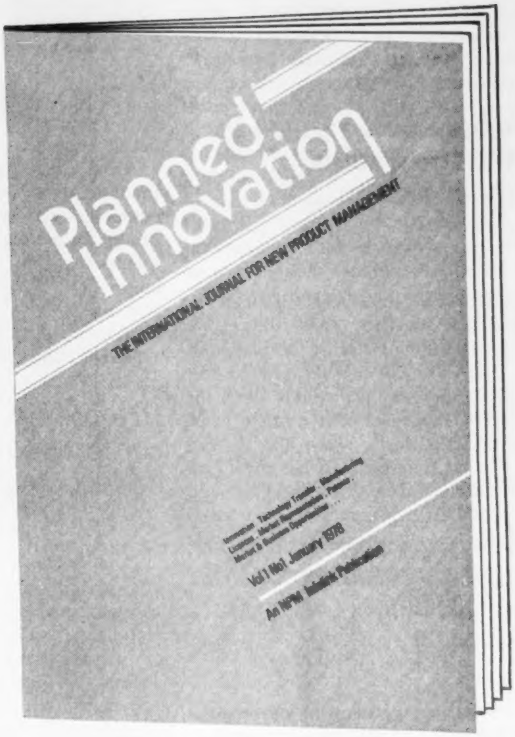
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New products

ICI offers new ranges for continuous dyeing of polyester cotton

Two new dye ranges have been introduced by ICI which, the company says, will revolutionise the continuous dyeing of polyester/cellulose fabrics used increasingly by the world's textile industry. Procion T dyes, the first complete fibre-reactive dye range to be available in liquid form, are a new class of reactive dye for cellulose. ICI has developed these dyes incorporating a discovery licensed exclusively to ICI. Dispersol T dyes are based on a new class of disperse dye invented and developed by ICI for polyester fibres.

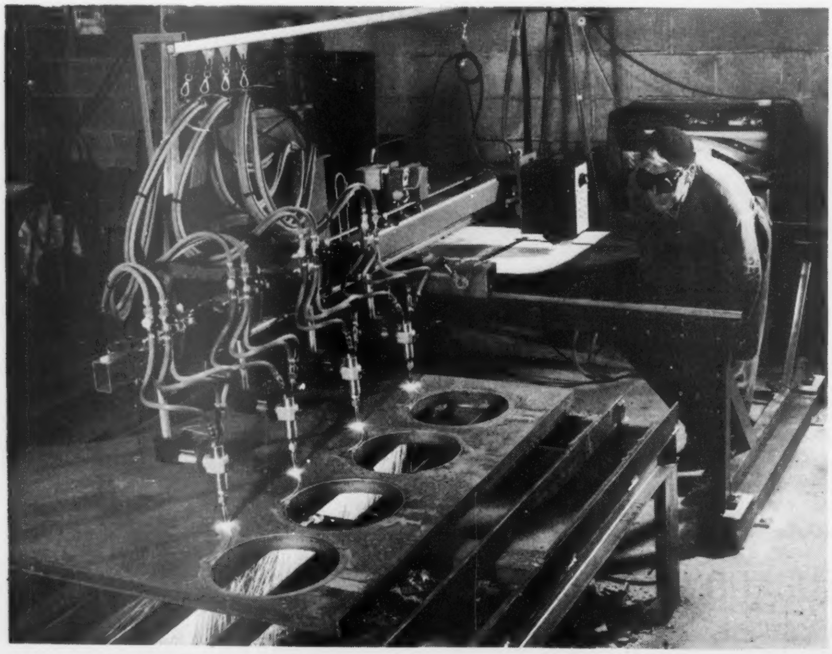
As an integrated dye system, it is claimed that both dyes used on conventional dyehouse equipment offer the world's first single-stage process for the continuous dyeing of polyester/cellulose fabrics in all depths of shade, with major savings in energy and chemical costs and significant technical advantages over existing systems.

Further information: circle 356

BOC produces low-cost profile burner

Sparrowhawk, a new line following, co-ordinate drive cutting machine built by BOC Ltd is said by the company to be the lowest cost machine of its type on the market. Designed to appeal to small-to-medium profilers with a need for greater production capacity, it is also built to suit those larger fabricators and profilers requiring stand-by machine capacity. Sparrowhawk has a 1.5 m working width and can be fitted with up to four manual cutting heads for high, sustained output. A principal feature of the machine is its fully solid state optical scanner giving automatic edge of line and silhouette tracing from easily prepared drawings over a speed range of 50 to 750 mm/min.

Further information: circle 358



Projection system combines roll and microfiche features

A low-cost microfilm projection system, combining the advantages of roll-film with those of microfiche, has been introduced by Microform Communications International Ltd.

Known as Fichette, the system is housed in a strong, lightweight carrying case, 250 mm by 205 mm by 75 mm, containing projector, a specially-developed, highly reflective, grainless screen, fiche carrier, fiche library, mains lead, optional extra lenses and roll-fiche cassettes each containing 2.4 m of 105 mm film accommodating up to 6000 images. The screen is automatically fixed upright when the case is opened. Cassettes are easily and rapidly loaded with thin-based film, and have a split spindle design which facilitates quick-film securing.

Made of high-impact, flame-resistant plastics, the Fichette projector is safe in use and is claimed to withstand rough usage. All normal microfilm reduction ratios are accepted. Features include a built-in dual voltage transformer with automatic overload cut-out and a 23 W light source. The projector weighs approximately 1.3 kg and can be run from a 115 V or 230 V ac mains or a 12 V battery. In addition to microfiche and cassettes, the projector also accepts jackets, aperture cards and film strip.

Further information: circle 357

Coolers utilise closed circuit evaporative process

A new series of closed-circuit evaporative-process liquid coolers has been added to the Minicooler series manufactured by Davenport Engineering Co Ltd. Minicooler is a small-package water-cooling tower in which water and air flow in opposite directions.

In the new series, which ranges in size from 0.6 m^3 to 2.8 m^2, part of the core of the Minicooler has been replaced by a collection of heat-exchange tubes. Process fluid flows through these tubes which are cooled by a cascade of circulating water which passes over them. Circulating water is maintained at an even temperature by the evaporative effect caused by air which is drawn through the tubes, waste heat being dispelled to the atmosphere.

Davenport Engineering claims that the closed-circuit system eliminates the need for a separate heat exchanger and simplifies system design and installation. It can be used for the direct cooling of oils, chemical-plating solutions and cooling waters where a contaminant-free circuit is essential. The system can also be adapted for use as an evaporative condenser in refrigeration cycles and other processes.

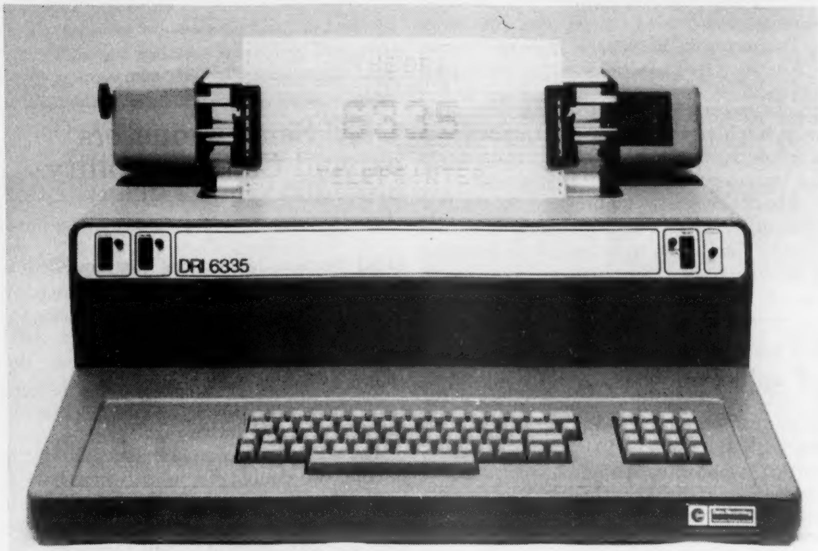
Further information: circle 359

YIM and ICI join in heat exchanger repair service

A heat exchanger leak detection and repair service is being jointly offered by ICI and Yorkshire Imperial Metals. The physics and radioisotope services group of ICI's petrochemical division operates an inspection service covering both on and off-line testing for shell tube leakage and tube corrosion inspection in heat exchangers. Where leakage is detected the 'Yimpact' section of Yorkshire Imperial Metals is able to offer a unique system for permanently sealing leaking tubes using explosively welded plugs.

On-line leakage testing is usually carried

Quiet teleprinter from Data Recording Instrument



A new terminal printer model – receive only or keyboard send-receive – capable of receiving serial asynchronous data at speeds up to 9600 baud is announced by Data Recording Instrument Co Ltd. DRI model 6335 is quiet in operation, says the company, suiting office environments. Printed lines contain up to 132 characters formed on a 7 by 7 dot matrix. Paper handling is by pin feed tractors adjustable from 102 mm to 388 mm; up to five-part carbon interleaved stationery may be used, which is fed either from below or from the rear. Data input, printing and page formatting are microprocessor controlled. Printing is bi-directional, logic seeking, obviating the need for carriage returns after every print line. Models are available with 64 and 96 characters and there are several national variants.

Further information: circle 360

out using radioisotopes, while off-line testing may involve any one of several tracers including helium and chlorinated hydrocarbons.

After surface scale has been removed from the tube or tube plate requiring repair, a plug containing an explosive charge is inserted in the end of the tube. The charge is then detonated with the result that the plug and tube surface are welded permanently together.

The ICI heat exchanger inspection service and the Yimpact plugging service are available either jointly or individually, and both have the facility to respond to urgent jobs as well as undertaking routine maintenance work.

Further information: circle 361

Multimeter gives true rms measurements

A multimeter suitable for electricity supply, electronics, process control and research and development applications is being offered by Gould Advance Ltd. It can be used for measuring true root mean square (rms) voltages, thus accurately giving the energy content of ac waveforms. The instrument can therefore be used wherever correct power assessment is of vital importance. The DMM9 incorporates a rms sensing ac/dc converter which accepts waveforms with a crest factor (ratio of peak to rms value) of up to four at full scale. There is also a combined ac/dc facility for measuring ac waveforms with a dc content.

Liquid-crystal display

Maximum reading of the instrument's four and a half-digit, seven-segment, liquid-crystal display is 19999 and measurement accuracy is claimed to be 0.05 per cent. Maximum resolutions on the current, voltage and resistance ranges are 10 nA, 10 microvolts and 100 milli-ohms respectively. There are 28 measurement ranges for ac and dc voltage current and resistance, including a separate 10-A current range. Dimensions of the multimeter are approximately 225 mm by 70 mm by 260 mm and it weighs 1.9 kg.

Further information: circle 362

Marconi produces electrically conductive concrete aggregate

Electrically conductive concrete can be produced with a building aggregate, believed to be the first of its kind in the world, developed by Marconi Communications Systems Ltd. Marconite is a granulated electrically conductive aggregate which replaces normal concrete fine aggregates, such as natural sand, permitting electrically conductive concrete to be designed by applying conventional concrete technology.

The aggregate produces concretes of normal compressive strengths but with a wide range of pre-determined volume resistivity values. Advantages of Marconite include permanent earthing, screening for electrical and electronic equipment and protection from static electricity. Possible other uses range from permanent electrodes for impressed cathodic protection systems to dielectrics with high loss tangents.

Marconite provides an earth plane in the form of a floor screed and results in simple universal earthing and screening which can be continuously extended as work progresses. This is particularly important in providing power and radio frequency earths for radio, television and radar transmitters, signal processing equipment, computers and similar equipment, and the screening of areas from electro-magnetic interference, and is far less complicated and time consuming than conventional methods.

Further information: circle 363

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Injection moulder aids short-run components maker

To facilitate the output of high performance thermoplastic components for industry in small quantities – anything from 500 to 10,000 – Submarine Products Ltd have installed a Butler-Smith horizontal injection moulding machine, specially adapted for vertical operation. The machine incorporates many other modifications designed to increase the range of options the company can offer.

Further information: circle 364

BUTLER-SMITH
BUTLER-SMITH

Technology news

NCC course explains basic computer concepts

A half-day course, 'Basic Computing Concepts' has been designed by the National Computing Centre Ltd combining video cassettes with documentation, slides and notes to educate, inform and motivate staff.

The training is based on the approach that, although only a handful of specialists actually run the computer, its effective operation depends on many people in the organisation. These are the people who supply the input and use the output and it is necessary that they understand their part in the success of the system. They need to understand the computer's uses and limitations and appreciate the need for accuracy.

The course is built around four sessions: 'Introducing the computer' which compares computer systems with clerical operations to illustrate how and where the computer can assist staff and the organisation; 'A look at the hardware' which explains important terminology with stress on communicating with the machine; 'Driving from computer' which describes the jobs of those who work in data-processing and shows how a task is broken down into steps which a computer can perform; and 'Master or slave' which shows that the computer's performance depends on how well it has been instructed and that the computer cannot produce good results from bad input, thereby stressing the special responsibility of those who provide that input.

The package is designed so that a training officer or computer manager can present a course with minimum of preparation.

Further information: circle 365

New crack depth gauge licensed

Harwell has licensed the Unit Inspection Co, Swansea, a part of the British Steel Corporation, to manufacture its new ultrasonic crack depth monitor. The firm will use the monitor in its nondestructive testing service work and may, at a later date, put the equipment on the market.

The monitor was developed by scientists in the nondestructive testing centre at Harwell, a research laboratory of the UK Atomic Energy Authority, with backing from the mechanical engineering and machine tools requirements board of the Department of Industry. It uses precision timing of diffracted ultrasonic signals to measure the depth of surface cracks. Because it can look at the precise depth of cracks rather than just detecting their presence, it is hoped the monitor will be the first in a whole series of new ultrasonic instruments for various crack depth measurements.

The monitor is to go on show for the first time on the NDT centre stand at the Materials Testing Exhibition, to be held at the National Exhibition Centre, Birmingham, from 13 to 16 March.

River bed frozen in study of salmon

Freezing the bed of a river and carrying a block of it off to a laboratory for study was part of an investigation to check whether conditions were good for salmon breeding. The procedure devised by the British Oxygen Company Ltd is to subject the river floor to a temperature well below freezing in order that a solid section may be removed for analysis. A pipe is inserted into the bed to a depth of 45 cm and into this is poured liquid nitrogen at minus 196° C. Although this gasifies, it is still colder than minus 100° C so that where the gas penetrates the gravel on the river bed the mass becomes frozen. A whole block of the river bed is then lifted out, packed in ice and quickly transported to nearby laboratories. The block is cut into sections, thawed and dried. Sieving and weighing then provides an accurate analysis of the structure of the river bed. When this is done at intervals, changes can be detected and recorded and preventative action taken.

GEC Semiconductors expand CAD capability

GEC Semiconductors has just installed a GEC 4070 computer to substantially increase its computer-aided design (CAD) facility for customers. Formed some six years ago, GEC Semiconductors has concentrated on the complete design and fabrication of both specialised and custom-made large-scale integrated circuit devices.

The GEC 4070 computer has 192 kbytes of core, two double disc units (which have a total capacity of about 18 megabytes), and a magnetic-tape peripheral. This is a multi-user machine with 16 input/output channels.

The substantial increased CAD capability has not been brought about by increased computing power alone, but more by a combination of the new computer and existing facilities. Until now the design team, of some 24 engineers, has used two Applicon Designer Assistant systems. These will now be used exclusively for interactive graphics and the 4070 for numerical jobs.

With this greater flexibility and power, it is now possible to undertake a higher volume of more complex work such as circuit simulation and modelling, mathematical analyses, and the creation of complex test procedure tapes for its macrodata automatic integrated circuit test systems.

Consub 2 starts work for offshore industry

Consub 2 the unmanned submersible work vehicle developed by British Aerospace, dynamics group at Bristol will be used extensively throughout 1978 by its owners Sub Sea Surveys Ltd, of Barrow-in-Furness in maintenance and inspection work for the offshore industry.

Manufacture of the Consub 2 system was completed last summer and the intervening months have been spent in extensive sea trials working with personnel from Sub Sea Surveys. Sea trials culminated in Sub Sea Surveys using Consub 2 commercially for the first time in the autumn when a video survey of the Marathon gas pipeline running between Kinsale Head Field and the coast of Cork, a distance of 36 miles, was undertaken. The survey was successfully completed and included one dive of 24 hours duration.

The Consub submersible can carry a variety of payloads: manipulators with power tools, scientific equipment – geological sampling, and oceanographic instruments, cine cameras, mono and colour tv and video recording, stereo still cameras, sonar packages and standard underwater navigation systems. The complete Consub 2 system includes a fitted out control and observation cabin, power supplies cabin and a powered winch with automatic control and umbilical cable.

Typical tasks for which the Consub 2 system is designed are undersea surveying, site preparation, inspection, installation, repair and salvage work generally, and scientific surveys of various types.

Eurotherm supply controls for sterilised post-surgical care

A new system for post-surgical care of limbs aids healing by enclosing the limb in regulated atmosphere environment instead of conventional dressing. Electronic controls of high accuracy supplied by Eurotherm Ltd are an important part of the system.

The Sterishield, developed originally by the Biomedical Research and Development Unit (Bradu) of the Department of Health and Social Security at Queen Mary's Hospital, Roehampton, is produced and marketed by Cape Engineering Ltd of Warwick.

Plastic treatment bag

The system consists of a plastic treatment bag which fits over the limb, with a non-constricting soft seal based on the same principle as a hovercraft pleated skirt, and an environmental control console. Room air is drawn into the console through a filter and compressed. After cooling the pressure is adjusted by regulators, passed through a bacterial filter and, finally, heated to a set temperature as it passes into the hose connecting the console to the treatment bag.

The low humidity of the air and bacterial filtering prevent surface infection of open wounds. The air pressure is normally alternated between high and low levels on a time cycle: this assists blood and lymphatic circulation thus preventing or reducing swelling.

Two Eurotherm 200 timers control the pressure sequence. One controls the high-pressure phase and the other the low-pressure phase, running in alternation. Each can be digitally set from 0 to 999 seconds in 1 second increments, but for normal operation the period is between 10 and 30 seconds. At Roehampton the effects of different cycle times are being studied, the use of the two, easily reset, timers makes it possible to select various lengths of time for each phase independently of the other.

Lower limit temperature

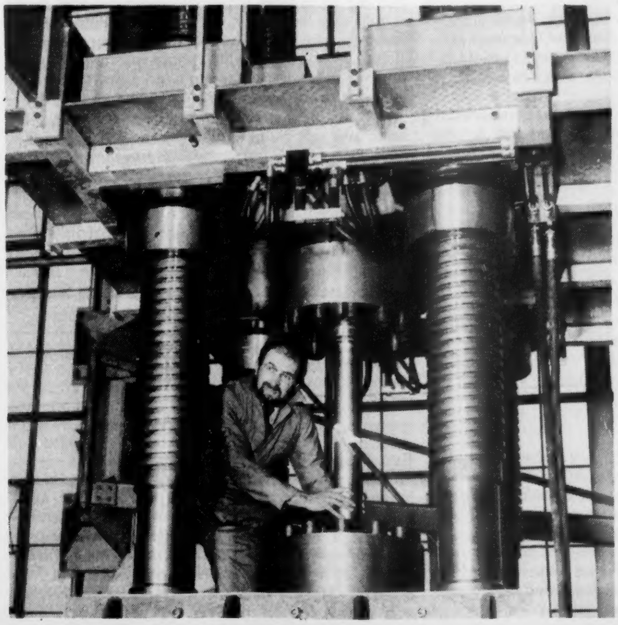
There is a lower limit of temperature of 5 °C to 6 °C above ambient because cooling after compression is by drawing room air over a heat exchange tube. The control range is 32 °C to 38 °C with regulation within a degree. A Eurotherm 070 controller is used with air output temperature sensing by a thermocouple in the hose close to the treatment bag.

Coarse solids in the pipeline – TRRL report

Results of a study of the behaviour of coarse granular solids when pumped as slurries through pipelines have just been published in a Transport and Road Research Laboratory report, TRRL Supplementary Report. Limestone aggregates with a variety of gradings and colliery spoil up to maximum sizes of 50 mm were pumped through a steel pipe of 156 mm diameter. Considerable savings occur as the pipe diameter is increased and it is likely that the specific energy would be roughly halved if the diameter were doubled. Photograph shows a technician on the test rig diverting the slurry to measure its weight and volume.

Earthquakes – by order

This machine designed and developed by Dartec of Stourbridge can simulate the effects of earthquakes on buildings – and even recreate earthquakes that have actually happened in the past. The machine will generate cyclic loads of up to 1000 tonnes to simulate the inertia forces acting on various parts of a building. The complete sequence is electronically controlled. This one – largest of its type ever to leave the UK – is destined for the University of Canterbury in New Zealand.



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HARWELL

Parliament

Monday, 30 January

Japanese exports to UK

Tom Litterick (Birmingham, Selly Oak) asked the Secretary of State for Trade, if he was satisfied with the progress of negotiations to reduce or restrain the rate of growth of Japanese consumer goods exported to the United Kingdom; and if he would make a statement.

Mr Meacher said that the latest in a series of discussions between the UK and Japanese industries about the UK market for television sets and music centres had been concluded satisfactorily in November. Japanese exports of pottery and stainless steel tableware to the UK had been restrained by the Japanese government for a number of years on an acceptable basis. The British and Japanese industries would meet in February to discuss the UK's market for vehicles; the government was concerned that a satisfactory outcome to those discussions was reached. Altogether about a third of UK imports of Japanese goods was now subject to understandings of this kind.

Market entry guarantee scheme

Michael Morris (Northampton South) asked the Secretary of State for Trade what proposals he had to introduce a new scheme under the British Overseas Trade Board called market entry guarantee scheme; and, if so, when.

Mr Meacher said that the British Overseas Trade Board had announced a market entry guarantee scheme on 26 January. Full details had been published in *Trade and Industry* on 27 January and descriptive leaflets and application forms were available from BOTB offices.

ECGD cover for South Africa

Robert Hughes (Aberdeen North) asked the Secretary of State for Trade how many export credit guarantees for exports to South Africa were granted in each of the years 1970 to 1977; and what was the total value of such guarantees for each year over the same period.

Mr Meacher said that normal ECGD facilities had been available for exports to South Africa during the period 1970-77, and these facilities had been widely used by exporters. It would not be possible to give details of the number of export credit guarantees issued in this period as ECGD records were not kept in that way, since the great bulk of export business guaranteed by ECGD was covered by means of the comprehensive guarantee system under which an exporter's worldwide turnover was covered by a single guarantee and the exporter was not required to declare individual transactions to the ECGD.

ECGD cover for the Yemen

Andrew Faulds (Warley East) asked the Secretary of State for Trade what were the present arrangements for export credit guarantees being made available for exports from the United Kingdom to the People's Democratic Republic of Yemen.

Mr Meacher said that the standard facilities of the Export Credits Guarantee Department were available for exports on short-term credit to the People's Democratic Republic of Yemen. Transactions on longer credit terms were considered on their merits in accordance with the criteria normally applied by ECGD to such business.

Proposed British Film Authority

Eric Moonman (Basildon) asked the Secretary of State for Trade whether he would make a statement on the Interim Action Committee on the Film Industry; and whether he would initiate discussions with the various sections of the film industry on the interim action committee report.

Mr Meacher said that the interim action committee had presented its first report to the secretary of state on the setting up of a British Film Authority, which was being considered. Further reports from the committee on the other aspects of its terms of reference were expected. He pointed out that the IAC had already of course had discussions with various sections of the film industry on the BFA, but added that he would be pleased to receive any other views on the setting up of such an authority.

Assistance to YKK Zip Fastener Company

Nicholas Winterton (Macclesfield) asked the Secretary of State for Industry how much public money had been given by his department in the form of grants to the YKK Zip Fastener Company, Runcorn, Cheshire, during the last year for which figures were available.

Mr Cryer replied that apart from the quarterly publication in *Trade and Industry* of regional development grant payments in excess of £25,000, information about payments to individual companies was confidential between the applicant and the department. However, the published figures of grant paid amounted in total to £314,000 in the period 1974-75 and 1975-76. No other form of assistance had been given by his department under the Industry Act 1972.

European policy on steel

Kenneth Clarke (Rushcliffe) asked the Secretary of State for Industry, what steps the European commission had taken under article 46 of the European Coal and Steel Community treaty to lay down the general objectives for modernisation and long-term planning of steel manufacture; what effects these steps had had on government's policy to the steel industry and European financing of investment in the British steel industry; how far government's policy towards the steel industry was compatible with the commission's objectives; and whether he would make a statement.

Mr Huckfield said that the commission was revising its steel market forecasts for the 1980's before making specific proposals about modernisation and long term planning. The latter were issues in the present discussions between the government, the British Steel Corporation and the TUC steel committee.

Sale of caravans

Michael Ward (Peterborough) asked the Secretary of State for Prices and Consumer Protection, what representations he had received about trade practices on the sale of caravans.

Mr Fraser replied that he had received a number of complaints about undesirable practices connected with the sale of caravans. These particularly involved the sale of holiday caravans by certain site operators.

Detection of restrictive trade practices

Andrew Bennett (Stockport North) asked the Secretary of State for Prices and Consumer Protection, how many unregistered restrictive trade practices were detected by the Monopolies Commission in 1977; and what steps he was taking to make the law more effective.

Mr Fraser said that no unregistered restrictive trade agreements were actually detected by the Monopolies and Mergers Commission in 1977 but in reports published during 1977 the commission had referred to their earlier discovery of unregistered agreements in respect of bread and diazo copying materials. As a result of these discoveries the Director-General of Fair Trading had placed 77 agreements in respect of bread and 33 in respect of diazo copying materials on the public register. The director-general had recently discovered and registered 133 restrictive agreements covering ready-mixed concrete. Mr Fraser said that he intended at the earliest opportunity to seek a strengthening of the Director-General of Fair Trading's powers to investigate unregistered restrictive agreements.

Consumer credit act

Betty Boothroyd (West Bromwich West) asked the Secretary of State for Prices and Consumer Protection whether he would implement sections 87, 88 and 89 of the Consumer Credit Act 1974 relating to notice of default on payment before repossessing goods on hire; and on what date these sections would become effective.

Mr Fraser said that he hoped that it would be possible to make the necessary order and regulations in the latter part of the year.

Ministers

Department of Industry

Secretary of State: Eric Varley
Ministers of State: Alan Williams
Gerald Kaufman
Parliamentary Under-Secretaries
of State: Robert Cryer
Leslie Huckfield

Department of Trade

Secretary of State: Edmund Dell
Parliamentary Under-Secretaries
of State: Michael Meacher
Stanley Clinton Davis

Department of Prices and Consumer Protection

Secretary of State: Roy Hattersley
Minister of State: John Fraser
Parliamentary Under-Secretary
of State: Robert Maclennan

Credit and hire advertisements

John Ovenden (Gravesend) asked the Secretary of State for Prices and Consumer Protection what action he proposed to take on the misleading advertising of credit terms; and Hugh Dykes (Harrow East) asked when the secretary of state intended to publish new regulations covering the disclosure of information in advertisements and elsewhere to applicants for credit loans and hire purchase finance.

Mr Fraser said that he proposed to lay before parliament this session regulations governing advertisements and quotations under the Consumer Credit Act 1974. The regulations and the associated provisions of the act would regulate the content of credit and hire advertisements and quotations and provide that an advertiser committed an offence if an advertisement contained information which in a material respect was false or misleading.

Regulating flash offers

Max Madden (Sowerby) asked the Secretary of State for Prices and Consumer Protection if he would seek powers to require that goods displayed as 'Xp off' showed the price from which the reduction was claimed; and Kevin McNamara (Kingston upon Hull Central) asked the secretary of state if he would seek to regulate flash offers.

Mr Maclennan said flash offers and similar practices undoubtedly tended to confuse consumers. He was considering introducing a requirement that when a price reduction was shown both the net price and the price from which the reduction was made should also be marked. The Office of Fair Trading had been examining the general question of bargain offers and was expected to submit recommendations shortly. When these were to hand a decision would be made on the action that was needed.

Beer and spirits price increases

Leslie Spriggs (St Helens) asked what price increases of beer, spirits and soft drinks had taken place during each of the last three years for which this information was available.

Mr Maclennan said that he regretted that reliable information was not available for soft drinks. For beer and spirits the average price increases in licensed houses had been as follows:

Year ending	Beer	Spirits
	%	%
December 1975	25	29
December 1976	18	9
December 1977	14	11

Retail price index movements

Mike Thomas (Newcastle upon Tyne East) asked what was the annual rate of increase in the retail price index at the latest available date; Gwilym Roberts (Cannock) asked what were the latest figures available for changes in the retail price index; Margaret Bain (East Dunbartonshire) asked what was the latest increase in the retail price index; and John Wakeman (Maldon) asked what was the increase in the retail price index since February 1974.

Mr Hattersley said that the retail price index had risen by 0.5 per cent in December 1977. This brought the annual rate of increase down to 12.1 per cent. The increase since February 1974 was 85.3 per cent.

Forecast for RPI

Tim Rathbone (Lewes) asked the Secretary of State for Prices and Consumer Protection whether he would forecast the rate of price inflation at the end of 1978; and Dr Oonagh McDonald (Thurrock) asked what was his present estimate of the likely trend in retail prices over the next 12 months.

Mr Hattersley replied that he expected the annual rate of inflation to fall to single figures by the spring. The size of further reductions was crucially dependent upon the general level of wage settlements remaining within the government's guidelines.

OECD forecast for UK

Tony Durant (Reading North) asked the Secretary of State for Prices and Consumer Protection what was his attitude to the conclusions of the Organisation for Economic Cooperation and Development economic outlook for the United Kingdom 1978, number 22.

Mr Hattersley replied that he was glad to note that during the last six months for which information was available inflation in the UK was running below the OECD figure. He was gratified to discover that the OECD shared his view that once Britain had reached single figure inflation at an annual rate it would be maintained throughout 1978.

Price increases abroad

Richard Page (Workington) asked the Secretary of State for Prices and Consumer Protection what was the cumulative increase in prices between February 1974 and the latest date in West Germany, the United States of America, Japan, France and the United Kingdom.

Mr Maclennan said that the cumulative increase in prices between February 1974 and November 1977 (the latest date for which comparative figures were available) were West Germany 17¾ per cent, United States of America 31 per cent, Japan 41¼ per cent, France 46½ per cent, and the UK 84¼ per cent.

Food prices in 1977

W. Hamilton (Central Fife) asked the Secretary of State for Prices and Consumer Protection if he would make a statement on the trend in food prices in the last 12 months and the prospects for the ensuing year.

Mr Maclennan said that prices rose by about 10½ per cent in the year ending December 1977. This was less than half the increase seen at December 1976.

RPI and potato prices

Edwin Wainwright (Dearne Valley) asked the Secretary of State for Prices and Consumer Protection what, in annualised terms, was the increase in the retail price index since 1 August 1977 up to the latest available month; and what were the corresponding figures for the retail prices of potatoes, potato crisps and frozen chips, respectively.

Mr Maclennan said that between 16 August and 13 December 1977 the retail price index had risen by 2.0 per cent, equivalent to 6.1 per cent on an annualised basis. Short term fluctuations might however make annualised figures misleading particularly for individual products. Since August the prices of raw potatoes and of potato products had fallen by 15 and 10 per cent respectively.

Clement Freud (Isle of Ely) asked the Secretary of State for Prices and Consumer Protection what had been the average price of potatoes in 1976 and 1977; whether this fall continued to be reflected in the retail price of potato products such as crisps and fish shop chips; whether he remained satisfied with these figures; and if he would make a statement.

Mr Maclennan said that the average retail price for potatoes was 12p per lb in 1976 and 8p per lb in 1977. Little information was available centrally about the prices of chips in fish and chip shops, which varied considerably between different shops. He understood however that there had been price reductions although the friers faced increased costs in other respects which were partly being borne on the price of chips. The Price Commission had powers to investigate particular price increases.

Annual price increases

Dennis Skinner (Bolsover) asked the Secretary of State for Prices and Consumer Protection if he would now introduce measures to control prices within 12 monthly intervals; and if he would make a statement.

Mr Maclennan said that he would not, although in view of the fall in the rate of inflation, he thought it desirable that price increases at intervals of no less than 12 months should from now on be accepted as the normal practice.

Complaints on petrol prices

Ron Lewis (Carlisle) asked the Secretary of State for Prices and Consumer Protection what representations he had received about variations in retail petrol prices in different parts of the country; and whether he had referred them to the Monopolies and Mergers Commission currently studying prices and supply of petrol.

Mr Maclennan said that he had received a number of representations. Regional variations were not included in the terms of the current reference to the Monopolies and Mergers Commission. However, he was arranging for these complaints to be brought to the commission's attention.

Manufacturers' recommended prices

Tom Litterick (Birmingham, Selly Oak) asked the Secretary of State for Prices and Consumer Protection if he would use the Price Commission act to stop the use of artificially inflated makers' recommended prices.

Mr Maclennan said that the secretary of state would and that he shortly proposed to direct the Price Commission to examine recommended retail prices in bedding. Further directions relating to the practice in other sectors might be issued subsequently. The decision to take action on a sectoral basis did not preclude legislation or other steps at a later stage to prohibit the practice completely.

Display of retail prices

Cyril D. Townsend (Bexley, Bexleyheath) asked the Secretary of State for Prices and Consumer Protection if, in order to prevent profiteering, particularly at the expense of tourists visiting London, he would seek legislation to require street traders to display prices.

Mr Maclennan said that the government intended to make an order requiring price display for retail sales of food and drink and was currently consulting interested parties on these proposals. He said that he was considering whether to include street traders in that order as a means of dealing with most of the undoubted abuses that took place.

Display of food and drink prices

Ioan Evans (Aberdare) asked the Secretary of State for Prices and Consumer Protection if he would seek to extend to consumer goods the legislation now applied to the display of petrol prices.

Mr Maclennan said that he would. Consultations with interested parties were currently under way on a proposed order covering food and drink. Further orders requiring prices to be displayed for a wide range of goods and services would be introduced.

VAT inclusive pricing

Bryan Gould (Southampton, Test) asked the Secretary of State for Prices and Consumer Protection when he proposed to make an order to provide for VAT-inclusive pricing in restaurants and shops.

Mr Fraser said that he was considering the report of the consumer protection advisory committee on the subject of VAT-exclusive pricing. There were a few issues arising from this report and he hoped to make an order as soon as he had resolved them.

Price and monopolies duplication

Nick Budgen (Wolverhampton South West) asked the Secretary of State for Prices and Consumer Protection what steps he was taking to prevent the duplication of effort between Price Commission investigations, Price Commission examinations, and Monopolies and Mergers Commission investigations.

Mr Hattersley pointed out that the Price Commission Act 1977 required him to consult the Director-General of Fair Trading and the Price Commission before initiating an examination in order that such duplication was avoided wherever possible. In addition, the review of competition policy would examine the relationship between the two commissions.

NW electricity board's proposed charges

James Lamond (Oldham East) asked the Secretary of State for Prices and Consumer Protection if he would request the Price Commission to examine the costs proposed to be charged for electricity in the north-western electricity board's area.

Mr Maclennan pointed out that the Price Commission had responsibility for initiating investigations under sections 4 and 5 of the act to investigate the price increases prices or margins of individual undertakings. The secretary of state had at present no plans to direct the Price Commission to examine these charges under section 10 of the Price Commission Act 1977.

Industry and the Price Commission

Neil Macfarlane (Sutton and Cheam) asked the Secretary of State for Prices and Consumer Protection what effect he expected the activities of the Price Commission to have on industrial production in the United Kingdom.

Mr Hattersley replied that the function of the Price Commission and the criteria by which it must act had been designed to take account of the interests of industry, the consumer and the nation. Its activities would promote competition and efficiency in British industry.

Price Commission reports

Fergus Montgomery (Altrincham and Sale) asked the Secretary of State for Prices and Consumer Protection how many reports he had received from the Price Commission since the coming into operation of the Price Commission Act 1977.

Mr Maclennan replied that the secretary of state had received seven reports under the Price Commission Act 1977, and a report on tea under schedule 1 to the Counter-Inflation Act 1973. He has also received the last report of the former commission for the period June and July 1977 and the first report of the commission since the coming into operation of the Price Commission Act 1977 covering their activities for the period August-October 1977 inclusive.

Complaints about Price Commission

Eric Heffer (Liverpool, Walton) asked the Secretary of State for Prices and Consumer Protection what complaints, other than those from the Opposition front bench spokesman, he had received over the operation of the Price Commission.

Mr Hattersley said that apart from comments on individual reports put to his department by the enterprises concerned, since August 1977 he had received one complaint about a questionnaire circulated to publishers in connection with an examination under section 10 of the Price Commission Act 1977.

Tris-treated pyjamas

Joyce Butler (Haringey, Wood Green) asked the Secretary of State for Prices and Consumer Protection if he was satisfied with the information available to consumers on the dangers of buying pyjamas which had been treated with the flame-resistant chemical Tris; and if he would make a statement.

Mr Fraser said that as far as his department was aware, Tris-treated pyjamas were not made or marketed in the UK. If such garments were found to be on sale, appropriate steps would be taken to secure their withdrawal.

Multifibre arrangement negotiations

William Whitlock (Nottingham North) asked the Secretary of State for Trade whether the full details of the negotiations conducted by the European commission with countries supplying low priced textiles, and of the renewal, with changed understandings, of the multifibre arrangement, had been made known to the textile trade in the United Kingdom; and what had been the reactions of the trade to the result of the negotiations.

Mr Meacher said that details of quota coverage had been published in *Trade and Industry* on 6 January and quota levels for 1978 would be published shortly. The reaction from the industry had in general been to welcome the result of the negotiations.

Tuesday, 31 January

Restrictive trade practices

Frank Allaun (Salford East) asked the secretary of state if he would seek to amend the law in order to make it a criminal offence not to register a price ring with the Office of Fair Trading and to operate a price ring against the public interest, in the light of the practices of certain firms in the Manchester area, details of which had been sent to him.

Mr Fraser said that the restrictive trade practices legislation already provided for the Restrictive Practices Court to make orders restraining firms from entering into or giving effect to restrictive agreements. Breach of these orders was subject to penal proceedings for contempt of court and punishable by a fine or imprisonment. Mr Fraser said that neither he nor the Director-General of Fair Trading were convinced that making failure to register restrictive agreements a criminal offence would improve the enforcement of the legislation. But he believed that there was a need to strengthen the director-general's powers to uncover unregistered agreements and he would be seeking to do this at the earliest opportunity.

Electrical appliances with plugs attached

Andrew Faulds (Warley East) asked the Secretary of State for Prices and Consumer Protection if he would introduce legislation to seek to ensure the sale of electrical appliances with plugs already attached, in order to offset the danger of shock and death in their later and possibly incorrect attachment, as established in the findings of the consumer safety unit.

Mr Fraser said that although such a requirement would have obvious advantages from the safety aspect, he understood that it could give rise to a number of practical difficulties. Another problem was the variety of plug and socket systems used in the UK. He added that he proposed to refer the matter to the Advisory Committee on the Safety of Household Electrical Equipment for consideration.

Shipbuilding intervention fund

Neville Trotter (Tynemouth) asked the Secretary of State for Industry, whether the resources of the shipbuilding intervention fund would be available for the new generation of North Sea emergency and firefighting vessels for British owners so that they might be constructed in British shipyards; and what action he was taking to achieve this.

Mr Kaufman said that no commitment to the use of funds could be made in advance of a specific application. The Secretary of State for Energy, was keeping him informed about future anticipated requirements in this field.

National Smokeless Fuels coke production

Gwilym Roberts (Cannock) asked the Secretary of State for Industry, what study he had made of the plans of the British Steel Corporation to spend £200 million revitalising its production of coke and its effects on National Smokeless Fuels coke production; and if he would make a statement.

Mr Huckfield said that the corporation's investment programme, including coke production facilities, was one of the issues covered by the present discussions between the government, BSC and the TUC steel committee. The secretary of state would make a statement as soon as he was able in the light of progress of these discussions.

Ethylene cracking capacity

Doug Hoyle (Nelson and Colne) asked the Secretary of State for Industry what was the present ethylene cracking capacity; and if it was sufficient to meet national needs.

Mr Cryer said that present UK ethylene capacity was 1.6 million tonnes a year, and this was currently sufficient to meet domestic demand. The ICI-BP cracker under construction on Teesside would produce a further 500 000 tonnes a year.

Co-financing new cinema production

Gwyneth Dunwoody (Crewe) asked the Secretary of State for Trade if he would seek to institute a scheme whereby all television companies operating in the United Kingdom paid a minimum levy of 5 per cent of the buying price of films shown on television into a common production fund suitable for co-financing new cinema production; and if he would take action to implement those changes in the distribution of films in the United Kingdom which could contribute to a healthier climate for the British cinema industry.

Mr Meacher said that the Interim Action Committee on the Film Industry would be considering, among other things, the question of closer co-operation between the cinematograph and television industries. He hoped it would report quickly on this issue, but would wish to consider its recommendations first before considering the institution of any such scheme. He pointed out that changes in the system of control of barring and allocation of product would require primary legislation and said that he was awaiting an early report from the interim action committee on these aspects.

Mandarin orange imports

Jim Spicer (West Dorset) asked the Secretary of State for Trade what tariff was currently paid on imported tinned mandarin oranges; and what percentage of imports currently came from Spain.

Mr Meacher replied that the main supplier of tinned mandarins to the UK in the period January to November 1977 was Spain who accounted for some 98 per cent of total imports. The current tariff on the bulk of these supplies was the full common customs tariff rate of 22 per cent together with a small additional charge to take account of the added sugar content.

Distribution statistics advisory committee

David Mitchell (Basingstoke) asked the Secretary of State for Trade which were the five organisations with substantial numbers of small retailers which sponsored five non-official members of the distribution statistics advisory committee; and how many of these five persons were actively involved in the running of small retail businesses.

Mr Meacher said that the following organisations with a substantial number of small retailers sponsored members of the distribution statistics advisory committee: the National Chamber of Trade, the Drapers Chamber of Trade, the Scottish Grocers Federation and Retail Consortium (two members). Two of the five members were known to be actively involved in the running of small to medium retail businesses.

Duties on white fish imports

Alick Buchanan-Smith (North Angus and Mearns) asked the Secretary of State for Trade what representations he had received regarding his proposals to suspend temporarily duties on the import of various species of white fish; what opportunity there was for consultation with the fishing industry; and what estimate he had made of the effect of such a suspension of duty on fish prices.

Mr Meacher said that an application had been received by his department for temporary suspension of the duties on certain of the main white fish species for use by the processing industry. In accordance with his department's normal practice representations had been invited from interested organisations and these were being considered. It was too early to say what the government's attitude would be. It was difficult to predict the effects of tariff cuts in isolation from other factors which affected fish prices.

Withheld ECGD cover

Fred Silvester (Manchester, Withington) asked the Secretary of State for Trade how many times, under section 2 of the Export Credit Guarantees Act, he had refused a credit on the grounds of a pay settlement.

Mr Meacher replied that two applications for guarantees under section 2 of the Export Guarantees Act 1975 had been refused because of a failure to comply with the government's guidelines on pay settlements.

Wednesday, 1 February

Hong Kong power station contract

Sir Paul Bryan (Howden) asked what was the number of jobs directly created or saved in British industry by the recently arranged contract for a power station in Hong Kong; and what areas would benefit; and what was the number of jobs indirectly created or saved and what areas would benefit.

Mr Cryer said it was estimated that the order for a 700 MW power station would safeguard the jobs of approximately 1300 employees of GEC and Babcock and Wilcox over three years. The areas which would benefit most were Renfrew, Larne, Manchester, Rugby and Stafford. It was estimated that the power station order would provide work in the UK for approximately 700 employees of sub-contractors to the power plant industry. The choice of subcontractors had not yet been determined.

EEC–Japan trade negotiations

Giles Shaw (Pudsey) asked the Secretary of State for Trade if he was satisfied with the outcome of the recent negotiations between the EEC and Japan prior to the general agreement on tariffs and trade; and if he would make a statement.

Mr Meacher said that the Japanese intention to reduce a wide range of their tariffs in advance of the multilateral trade negotiations (MTNs) had been welcome although this had come about as a result of formal negotiations between the EEC and Japan. He added that the proposed reduction in the duty on Scotch whisky had been particularly welcome. It was disappointing that no proposal had been made for a reduction in the high tariffs on biscuits and confectionery and the Japanese were being urged to reduce these tariffs also. Given the scale and cover-

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age of the advance tariff reductions proposed, it would be surprising if the increase in imports to be expected as a result of their being introduced was more than miniscule compared with the Japanese current balance surplus of $9.75 billion just announced for 1977.

Investigation into taxi charges

Sydney Bidwell (Ealing, Southall) asked when the commission of inquiry into London taxi charges would commence its work.

Mr Maclennan said that the conduct of the examination, initiated by the direction of the Secretary of State for Prices and Consumer Protection on 12 December, was a matter for the Price Commission. He understood that it intended to contact the trade and other interested parties in the near future.

Thursday, 2 February

Planning agreements

Ioan Evans (Aberdare) asked how many of the firms in the private sector which had received assistance from public funds since February 1974 in the form of grants and concessionary rate loans had entered into planning agreements with the government.

Mr Cryer replied that one company in the private sector receiving assistance from public funds had entered into a planning agreement. This was Chrysler (UK) Ltd.

Aid for refineries

T. Skeet (Bedford) asked what amount of aid, grant or subsidy had been made available from public funds to promote the extension of existing refineries or the construction of new ones in the United Kingdom during the past three years.

Mr Cryer said that assistance has been offered under the Industry Act 1972 as follows:

	1975	1976	1977
Section 7 regional selective assistance loans	0.10	—	—
grants	0.02	—	—
Section 8 selective financial assistance grants	—	20.2	—

He added that payment of regional development grant might also be made under part I of the act on the cost of new building and new plant and machinery required for refineries. Information on the total payments made for this purpose was not readily available.

Employment in textile and clothing industry

Max Madden (Sowerby) asked the Secretary of State for Industry, if he would list the decline in manpower in the main sectors of the textile industry, consequential upon increased productivity, re-equipment and reorganisation, over the last 10 years; and what had been the primary employment consequences of increased investment in the major sectors of the textile and clothing industry over post-war years.

Mr Cryer said that there were no official estimates of the employment consequences of increased productivity, investment, re-equipment and reorganisation in the textiles and clothing industry over the periods in question. It would be impossible to distinguish between the different factors listed or to isolate accurately other influences. However, while some jobs had been lost by the improvements in productivity which had been achieved over the years as a result of new investment and the more efficient use of manpower, on the other side of the equation the greater competitiveness which had been gained had helped maintain employment at a higher level than could otherwise have been expected. The long-term future of UK industry depended on securing improvements in productivity.

Imports under endangered species act

Peter Hardy (Rother Valley) asked the Secretary of State for Trade what was the tonnage of ivory imported into the United Kingdom in 1976 and 1977, the number of licences issued by the Department of the Environment, the number of licences returned to that department, and the tonnage of ivory imports accounted for by such licences; how many wild feline skins imported under tariff heading 43013587 into the United Kingdom in 1976 and in 1977 were licensed by the Department of the Environment and recorded by HM Customs and Excise; which species of wild felines were involved; and which of these were listed by the Convention on International Trade in Endangered Species of Wild Fauna and Flora; how many leopard, jaguar and ocelot skins were imported into the United Kingdom in 1976 and in 1977; and how many of the skins were covered by licence from the Department of the Environment; what was the volume of reptile skins imported from France and from the Union of Soviet Socialist Republic and the number of licences issued by the Department of the Environment for such imports in 1976 and in 1977.

Mr Dell said that the following was the information available from the UK Overseas Trade Statistics and Department of the Environment records. The licensing of imports under the Endangered Species (Import and Export) Act 1976 was a matter for the Secretary of State for the Environment; enforcement rested with HM Customs and Excise.

Table 1A. Actual imports of raw ivory (all forms)

Year	Weight
1976	27 426 kg (27.4 metric tonnes)
1977	18 827 kg (18.8 metric tonnes)

Source: UK Overseas Trade Statistics.

Table 2. Wild feline skins imported under tariff heading 4301-3587

No of skins covered by licences returned used		Species
1976	1977	
16 583	15 594	Tiger, tiger cat, leopard cat, margay, serval, and Geoffroy's cat

Source: Department of the Environment.

All the above species are currently listed in the Appendices to the Convention on International Trade in Endangered Species of Wild Flora and Fauna.

Recent inquiries have shown that the bulk of imports entered under this tariff heading in the Overseas Trade Statistics for 1976 and 1977 in fact related to weasels, foxes, badgers and other non-feline animals which should have been recorded under heading 4301-5022. Investigation of the statistics is continuing and corrected figures will be made available by HM Customs as soon as possible.

Table 1B. Import licences for raw elephant ivory

Year	Licences issued				Licences returned used			
	No of licences	Covering			No of licences	Covering		
		Kilogrammes	Tusks	Pieces		Kilogrammes	Tusks	Pieces
1976	44	81 433 (81.4 metric tonnes)	335	323	14	2 485 (2.5 metric tonnes)	201	323
1977	36	31 407 (31.4 metric tonnes)	305	—	8	6 779 (6.8 metric tonnes)	211	—

Source: Department of the Environment.

Table 1C. Import licences for other forms of raw ivory

	Licences issued				Licences returned used			
	1976		1977		1976		1977	
	No. of Licences	No. of Items	No. of Licences	No. of Items	No. of Licences	No. of Items	No. of Licences	No. of Items
Total	18		9		12		3	
Covering:								
Boar tusks (pieces)	8	6 000	—	—	2	6 000	—	—
Ox teeth	2	22 000	—	—	1	2 000	—	—
Lion's teeth	1	40	1	6	1	40	—	—
Narwhal tusks	4	80	1	25	2	52	—	—
Sperm whales' teeth	4	(a) 700 teeth, (b) 3 000 lb, (c) 500 kg	6	3 040 teeth	2	700	2	291
Sharks' teeth	5	10 905	1	2 000	4	10 405	1	2 000
Sharks' teeth (pieces)		2 000	—	—		2 000	—	—
Sharks' jaws (teeth from)		200	—	—		200	—	—

Source: Department of the Environment.

Table 1(A-C)
As import licences may express quantity in terms of either weight or number, it is not possible to say what tonnage of ivory they represent. The Overseas Trade Statistics may include imports of tusks of extinct species, such as mammoth and mastodon.

Table 3. Imports of leopard, ocelot, jaguar (and cheetah) skins

	No of skins actually imported		No of skins covered by			
			Licenses issued		Licences returned used	
	1976	1977	1976	1977	1976	1977
Leopard	140	2	1 338	7	159	7
Ocelot	9 935	8 408	25 886	14 342	7 535	8 219
Jaguar, cheetah	200	—	345	—	112	—

Source: UK Overseas Trade Statistics and Department of the Environment.

Table 4. Imports of reptile skins from France and the USSR

	Weight of skins and leather actually imported (in kilogrammes)				No of licences issued for import of skins			
	France		USSR		France		USSR	
	1976	Jan to Nov 1977	1976	Jan to Nov 1977	1976	1977	1976	1977
Raw skins, not split	25	—	—	—	10	10	1	—
Tanned leather (not further prepared)	—	455	—	—	—	—	—	—

Source: UK Overseas Trade Statistics and Department of the Environment.

Split reptile skins are not separately distinguished in the records of actual trade in the Overseas Trade Statistics.

Figures for imports of reptile leather, tanned but not further prepared, are given in the table, but not for other forms of reptile leather.

Used import licences returned to date indicate that one skin was imported from France in 1976 and 42 in 1977, but none from the USSR in either year.

Import licences for reptile skins may be expressed in terms of number, length or area.

Statistics derived from returned import licences relate to the year in which the importation took place, and for 1977 include only information on licences returned to date.

Official Receivers' offices

Official Receivers are responsible for the administration of cases in bankruptcy and compulsory liquidation. Inquiries should be addressed to the nearest Official Receiver.

High Court of Justice
Senior Official Receiver: J. B. Clemetson

Bankruptcy
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Strand, London WC2A 2JY (Tel: 01-405 7641)
Official Receivers: D. A. Thorne; J. Tye

Companies Winding-up
Atlantic House, Holborn Viaduct, London EC1N 2HD
(Tel: 01-583 8931)
Official Receivers: L. R. Bates; N. Saddler;
H. W. J. Christmas

Birmingham
Commercial Union House,
Martineau Square, Birmingham B2 4UP
(Tel: 021-236 8831/7)
A.K. Sales; J. F. Hirst

Bournemouth
Burlington Arcade,
Bournemouth BH1 2JS
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Cheapside, Bradford BD1 4LJ
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Brighton
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3rd Floor, Hayes House, The Hayes,
Cardiff CF1 2UG
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T. Wilks

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Stoke-on-Trent ST4 1QN
(Tel: 0782-45256/8)
A. N. Percy

Swansea
5th Floor, Sun Alliance Building,
166/167 St Helens' Road, Swansea SA1
5DL (Tel: 0792-42861/3)
P. W. Nunn

Watford
40 Clarendon Road, Watford WD1 AHJ
(Tel: 92-44288)
F. L. Sage

Hong Kong mass transit scheme

Sir Paul Bryan (Howden) asked what was the number of jobs directly or indirectly created or saved by the contract won by British contractors in the Hong Kong mass transit scheme; and in what areas employment had benefited.

Mr Cryer said that it was not practicable to estimate the number of jobs directly or indirectly created or saved by the winning of the contract by British firms, but work for the contract was providing employment over four years for some 3500 people in the railway equipment industry. Areas which had benefited included Yorkshire, the west-midlands and north-west and south-west England, where jobs would in some cases have been at risk if the contract had not been won.

BOTB support for missions

Rober Adley (Christchurch and Lymington) asked the Secretary of State for Trade why the British Overseas Trade Board was prepared only to provide support for a second representative from companies in overseas delegations sponsored by his department, provided that that person was a shop floor trade unionist; and what differential was made between delegations covering industries which were heavily unionised, and those which were not.

Mr Meacher replied that under the BOTB's outward missions scheme members of approved trade missions, normally one per company, received a grant towards travel and accommodation costs which varied from market to market. Consistent with its wider aim of encouraging closer association between management and shop-floor in export activity, the board offered a firm participating in a mission a second grant towards the cost of including a shop-floor representative where in the judgment of the firm, and with the approval of the chamber of commerce or trade association organising the mission, this would be advantageous from the standpoint of export promotion. The facility was not dependent on the operation of particular trade union arrangements within a firm and the choice of shop floor representative would be a matter for the management of the firm in consultation with the work force.

Code of conduct for firms in South Africa

Frank Hooley (Sheffield, Heeley) asked the Secretary of State for Trade, whether it was envisaged that British firms operating in South Africa would be required to report on the pay and conditions and trade union rights of African employees at six monthly or longer intervals; and if he would consult the Trade Union Congress and the Confederation of British Industry about appropriate means of monitoring the performance of British firms in South Africa, in the light of the standards set by the EEC code of conduct for European firms in South Africa.

Mr Meacher said that British companies would be asked to publish annual reports on progress as envisaged in the code of conduct of the Nine. He pointed out that the code provided that the governments of the Nine would annually review progress in implementing it. He was having consultations with the CBI and the TUC about the explanatory guidance which should accompany the code.

Inquiry into British Vanguard crash

Jerry Wiggin (Weston super Mare) asked the Secretary of State for Trade, if he would take steps to seek the re-opening of the inquiries into the British Vanguard crash at Hochwald on Tuesday, 10 April 1973 in the light of the discovery that continuous carrier-frequency signals used by Electricité de France may mislead aircraft approaching Basle airport.

Mr Dell said that he did not intend in the present circumstances to approach the Swiss authorities with the suggestion that they reopened the inquiry into the Vanguard accident at Basle. The relevant annex of the Convention on International Civil Aviation required new and significant evidence to be presented before an aircraft accident investigation could be reopened and he was not aware that this condition had been satisfied. Although the official report of the commission of inquiry did not say so, the French report on interference caused by continuous carrier-frequency signals passed through high tension cables was passed to the investigators by the French authorities during the course of the investigation. The commission concluded that this was not a significant factor in the accident. The commission attributed the accident to the loss of orientation (by the flight crew) during two approaches to land and added that confusion of navigation aids was amongst other things, a contributory factor. Mr Dell said that he had no reason to believe that this was any less valid now than it had been when the report was first released in September 1975.

Friday, 3 February

Bank applications for certificates

Ian Wrigglesworth (Teesside, Thornaby) asked the Secretary of State for Trade if his department consulted the Bank of England before listing a bank under sections 123 and 127 of the companies acts; what investigations his department makes before listing a bank under sections 123 or 127 of the companies acts.

Mr Clinton Davis said that applicants for both sections 123 and 127 certificates are required by the department to supply a range of detailed information, for example on their banking activities and financial position. In the light of this information, verified where possible, a decision on the application is made after consultation with the Bank of England and others.

Imports of vehicles and components

Tom Litterick (Birmingham, Selly Oak) asked the Secretary of State for Trade, what was the total value of United Kingdom motor vehicle and vehicle component imports as a proportion of total imports during the last 12 months for which this information was available; and what was the figure at the same time in 1976.

Mr Meacher said that imports were 5.6 per cent and 4.3 per cent by value in 1977 and 1976 respectively. Motor vehicle components are not in all cases separately identified in the *Overseas Trade Statistics* and the figures therefore include an element of estimation.

Braniff service from Dallas

Neville Sandelson (Hillingdon, Hayes and Harlington) asked the Secretary of State for Trade, which London airport would be served by the proposed new Braniff international service from Dallas.

Mr Dell said that under the terms of the Bermuda 2 Agreement the airport would be Gatwick.

David Watkins (Consett) asked the Secretary of State for Industry, what action was being taken in the northern region to assist small businesses.

Mr Cryer replied that to provide accommodation for small businesses in the Northern region the English Industrial Estates Corporation completed 52 nursery units in the three years up to 31 December 1977. A further 66 were under construction and 88 more had been announced. An additional area of factory space for small firms in central Newcastle of about 120 000 square feet was announced in October 1977. In November 1977 a counselling service to provide small businessmen with experienced guidance on their problems was introduced in the region to supplement the existing services provided by the Small Firms Information Centre at Newcastle. Most small manufacturing companies received regional development grants under the Industry Act. A substantial number of the 124 projects offered assistance in the year ended 31 December 1976 and 139 projects supported in the year ended December 1977 concerned small businesses. Some small companies also benefited from the sectoral schemes under section 8 of the act. The government had established a partnership with local authorities in Newcastle and Gateshead under the programme to assist inner city regeneration. Small firms had a vital contribution to make towards this end. Small firms in the area were given an opportunity to exchange views with central and local government at the conference held in Newcastle in January. The Department of Employment assisted eligible firms in the region's special development areas by means of the small firms employment subsidy. In the region's rural areas assistance was also given by the Development Commission through the construction of small factories and by the Council for Small Industries in Rural Areas through credit advisory and training services. These bodies were responsible to the Department of the Environment.

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Overseas trade news

UK-Romanian trade talks held in Bucharest

The fifth session of the UK-Romanian joint commission was held in Bucharest from 24 to 27 January, meeting under the joint chairmanship of John Steele, deputy secretary at the Department of Trade and Stefan Nicolae, First Deputy Minister for Foreign Trade and International Economic Cooperation. The British delegation included industrial representatives from the electronic, aviation and chemical engineering industries as well as government officials.

The joint commission reviewed progress in 1977 both on the general development of trade and in the development of economic, industrial, technological and scientific co-operation between the two countries. It also examined prospects for further development and diversification in these fields during the coming year.

It noted with satisfaction the increase in volume of bilateral trade, and both delegations expressed a wish to intensify the rate of development of trade in 1978 and the following year. The commission noted that there were particularly promising prospects in the aviation, chemical, metallurgical and engineering industries. In addition the two delegations discussed particular difficulties and obstacles to the growth of trade.

The next meeting of the joint commission, which meets annually in London and Bucharest alternately, will be held in London during the first quarter of 1979.

EETC reports on Romanian market

During its official visit to Romania in December 1977, the East European Trade Council, the British Overseas Trade Board's area advisory group for east Europe, found that counter purchase was an important area for discussion.

In its post-mission report EETC says that Romania's Ministry of Foreign Trade, which has a brief from the Planning Commission to balance external trade, instructed the foreign trade organisations to show mission members items which might be of interest to British partners. The Bank of Foreign Trade confirmed this approach, says EETC, saying that foreign trade organisations had to show that they had tried to find suitable buy-back items which would be acceptable to the foreign partner. The proportion of buy-back requested depended on the type of goods being imported and current relations/trade balance with that foreign partner.

EETC also reported that it felt the marketing expertise of the Romanian foreign trade organisations would be the long-term answer to the current spate of counter purchase problems and the mission took with it details of various marketing courses available in the UK. There was considerable interest in both the brochures on marketing courses that were distributed and in the mission's enthusiasm for joint Romanian/British marketing ventures in Britain.

BOTB assistance for UK firms at Bucharest

Tib '78 the Bucharest international trade fair, will be held from 5 to 14 October 1978. This is a biennial event and British firms have participated as a group with Department of Trade support, under the British pavilion scheme, since its inception in 1970. The event is by far Romania's most important trade fair, attracting many Romanian industrialists, technicians etc, and is an extremely convenient medium through which to approach the market and maintain contacts.

Product categories

Product categories included in the 1978 exhibition correspond closely with the major priorities of the current five-year plan, and companies wishing to export to Romania will wish to give careful consideration to the possibility of participating in this exhibition at a time when Romania's buying organisations can be expected to be formulating their import requirements needed to fulfil the targets of the 1976/80 plan. There is also increasing emphasis in Romania on co-operation, including the establishment of joint-venture companies, licencing arrangements, joint production and marketing and compensation trading.

The most promising areas for increased UK exports would seem to be mining, metallurgical, telecommunications, electronics and welding equipment, machine tools, pumps, compressors and equipment for the oil and fuel industry.

Potential participants should note that the fair authorities have indicated that as of this year, machines and equipment for the chemical, plastics and rubber industries, that were in the past within the scope of this fair, can in future only be exhibited at the international Spring Fair and Chemistry Show, Tibco '78, 4 to 12 May 1978.

The cut off date for applicants for the International Trade Fair is 1 March 1978 and so inquiries should be made as soon as possible to Howard Giles, Department of Trade, Room 111 Hillgate House, 26 Old Bailey, London EC4M 7HU, tel 01-248 5757 ext 7213.

More than 140 British firms pitch for orders in US

In February, 147 British firms, supported by the British Overseas Trade Board, will pitch for orders at specialist trade fairs in the United States. British products on display will range from china dolls to an automotive clutch which won a British Design Council award in 1977.

A joint venture of 25 firms, sponsored by the BOTB and the Export Council for the British Jewellery and Giftware Federation, will attend the international jewellery trade fair in New York from 5 to 8 February, where they will introduce collections of modern and reproduction jewellery.

For the first time the BOTB will support British companies at the world fair for technology exchange (Tecex) in Atlanta from 7 to 10 February. A group of eight firms, sponsored by the London Chamber of Commerce and Industry, will show audio-visual units, industrial control equipment, high-technology computer software systems, small-hole drilling radio technology, technical information systems, hi-fi leisure products and electronic instrumentation. In addition, the National Research Development Corporation will have a display about British inventions.

At the motor cycle and accessory trade show, Cincinatti, 10 to 12 February there will be a BOTB-backed display, arranged in association with the CMCA Service Co Ltd. Nine British companies will show luggage equipment, four-valve cylinder heads, petrol-injection frame kits, ignition systems, drive-link shock absorbers, clothing, shoes and a range of motor cycles.

Four British firms, sponsored by the British Footwear Manufacturers Federation, will exhibit at the national shoe fair, New York, 11 to 14 February. They will show casual and high fashion styles for men and women, fur-lined boots, slippers and accessories.

A group of 12 companies will be at the international cycle show in New York from 19 to 21 February supported by BOTB in association with the CMCA Service Co Ltd, exhibiting a new range of bicycles, components and accessories designed to make cycling safer and more comfortable.

Victorian-style bone china dolls, true-to-life toy animal families and a water-colour paint box to celebrate the fiftieth anniversary of Mickey Mouse, are among the new products from Britain to be launched at the American toy fair in New York, 19 to 22 February.Other exhibits at the fair will include puppets, aerobatic stunt kites, soft toys, dolls houses, dolls prams, mini-calculator games, skates, skate boards, rocking horses, dolls, model cars, activity books, games and jigsaws for the pre-school child. There will be 19 British firms supported by BOTB and sponsored by British Toy Fairs (International) Ltd, at the event.

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Products ranging from horse brasses, door furniture, fire irons, chopping boards, modern lighting and leather goods to woven pure silk miniatures, precision-made barometers and Irish linen will be shown by 22 companies at the New York gift show, 26 February to 3 March. The group is sponsored by the Westminster Chamber of Commerce.

Many new British developments will be introduced at the Society of Automative Engineers exposition and congress in Detroit, 27 February to 2 March. They will include a braking system intended to reduce the risk of wheel-lock, a machine which uses water jets to remove refractory and ceramic materials from castings, a digitally-controlled electonic fuel-injection system – claimed to be the world's first – an air-operated heavy truck disc brake, constant velocity joint axles and a diaphragm spring turnover clutch which won a British Design Council award in 1977. Under the sponsorship of the Society of Motor Manufacturers and Traders, 24 automotive component manufacturers will be at Detroit including major companies from the British automotive parts industry.

A group of 12 firms, organised in a joint venture by BOTB, in collaboration with the Scientific Instruments Manufacturers' Association of Great Britain, will be displaying chomatology equipment, infrared detectors, data systems, electron spectrometers, general laboratory equipment and technical books and journals at the conference on analytical chemistry and applied spectroscopy in Cleveland, 27 February to 3 March.

Increasing British participation at fashion shows

Britain was represented by 133 companies at three international fashion fairs running concurrently in the same exhibition complex in Paris from 4 to 7 February.

At the European menswear exhibition 56 firms – seven more than last year – were exhibiting in two British Overseas Trade Board joint-venture groups organised in conjunction with the Clothing Export Council and the British Menswear Guild. British menswear manufacturers consider this event the most important in Europe because of its worldwide attendance of buyers and exhibitors.

BOTB also backed a group of 47 firms at the knitting industries exhibition in association with the British Knitting Export Council. Since 1970, when a British group of eight firms was organised at this show, participation has increased regularly. The British display presented a comprehensive collection of fashion and classic knitwear for women, men and children. Worldwide British exports of knitwear amounted to £241 million in 1976, an increase of 50 per cent on 1975, and to £302 million from January to November 1977.

The children's fashionwear exhibition had a BOTB joint venture of 30 companies – compared with 22 last year – arranged in collaboration with the National Children's Wear Association.

Trade missions from over 30 countries to UK in February and March

During February and March 18 trade missions – totalling 206 overseas businessmen and women from more than 30 countries – will visit Britain under the British Overseas Trade Board's inward mission scheme.

The missions, from western Europe, the Middle East, Africa, south-east Asia, Australasia, South America and the United States, are interested in a wide range of industrial and consumer goods as well as 'invisibles'. Each mission will spend between three days and three weeks seeing production plants, factories, exhibitions, displays and trading concerns in various parts of Britain.

A building materials mission from Oman will visit London and Birmingham. A food-buying mission from Italy will visit and stay in London as will two missions from Italy and the Philippines concerned with 'invisibles'.

Two footwear missions from the Netherlands and Finland will tour Leicestershire and the Midlands. Fifteen wool buyers from the United States will concentrate on the south Yorkshire and Midlands areas. A group of editors of men's and boy's wear magazines from various countries will be spending their time at the Imbex exhibition at Olympia in London.

Machine-tool users from Sweden will travel from Plymouth to Leeds via London and the Midlands, and 20 French electronic components engineers will visit the north-east, the south-west, the south and London. A Nigerian railway equipment mission will visit London and the north and north-west and two global missions concerned with communications and telecommunications will visit Scotland, the home counties, the Midlands and London.

During 1977 a total of 53 sponsored missions – with more than 500 visitors from over 39 countries – were brought to Britain under the British Overseas Trade Board's inward mission scheme, which is operated by the BOTB's overseas visitors bureau. It enables overseas businessmen, journalists or others who can influence orders to visit production plants and industrial and commercial organisations in Britain to see the products or services available from the firms.

ECGD extends cost-escalation scheme . . .

Parliamentary approval is being sought to extend for a further year from March 1978 the powers under which the Export Credits Guarantee Department operates its cost-escalation scheme for export contracts. The scheme applies to export contracts worth £2 million or more with a manufacturing period of two years or more.

Announcing this on 2 February in a written answer to a parliamentary question Edmund Dell, Secretary of State for Trade, said: 'It is the government's intention to recommend to the house an extension for 12 months of the powers granted under section 5 of the Export Guarantees Act 1975, as amended by the International Finance, Trade and Aid Act 1977. Arrangements will be made to ensure that the scheme is administered in a manner consistent with the government's pay guidelines'.

Under section 5 of the Export Guarantees Act 1975, ECGD is empowered to give a measure of cover against UK cost increases for capital goods contracts. The powers to operate the scheme under the act lasted for two years until 26 March 1977, and were then extended for a further year until March 1978 (SI 1977/436).

Since the introduction of the scheme, seven guarantees have been issued for exports with a total contract value of £130 million. A further 12 cases involving contracts worth some £400 million are in active negotiation.

European editors visit British metalworking companies

G. Dabnor (centre left) area export manager of Rhodes Interform Ltd, Wakefield, illustrates a point to Giovanni Ardoino, editor of the Italian magazine, *Lamiera*. Mr Ardoino was one of six editors of European metalworking magazines who visited England from 16 to 20 January as part of an inward trade mission, organised by International Symposia and Exhibitions Ltd, under the sponsorship of the Institute of Sheet Metal Engineering. The editors toured metalworking establishments in the south Midlands and north England, inspecting the types of machinery which will be on show from 20 to 28 April at the Metal Working 78 exhibition which ISE are organising at the National Exhibition, Birmingham.

. . . and backs highest-capacity undersea link contract

A £14 million contract awarded to Standard Telephones and Cables for the supply and installation between Barcelona and Genoa of the world's highest-capacity undersea telecommunications cable system has been guaranteed by the Export Credits Guarantee Department.

The contract was awarded to STC jointly by Compania Telefonica Nacional de Espana of Spain and Azienda di Stato per i Servizi Telefonici of Italy and an ECGD bank guarantee to Midland Bank is being issued to help finance the project.

Firth Brown awarded Export Year certificate

South Yorkshire export committee has awarded The Firth Brown Tools Group a certificate of merit for its efforts during Export Year at the County Hall, Barnsley.

Clive Frith, international sales director, Firth Brown Tools, received the award on behalf of the firm from the master cutler, Stanley Speight.

JCB launches its own Export Year

J. C. Bamford Excavators Ltd, of Rocester, Staffordshire, has decided to run its own JCB Export Year for 1978, in an all-out effort to improve its export record.

As a way of providing a focus on export objectives, the company is giving away car stickers and badges to the 1600 employees. Sir Fred Catherwood, chairman of the British Overseas Trade Board, visited JCB on 8 February to lend his support to JCB Export Year. Other important visitors from the world of industry and commerce will also be calling on the company during the campaign to give lectures on a wide range of subjects allied to exporting.

JCB total sales for 1977 reached £84 million, 63 per cent of which were exports. In 1978 the company is going for a worldwide turnover of £105 million, aiming to capture a larger slice of the United States market in excavator loaders. At present JCB's main export area is Europe, which accounts for 70 per cent of sales.

British aid grant to Sudan

Judith Hart, Minister for Overseas Development, has approved a £14 million grant to Sudan to assist its economic development. The agreement (signed in Khartoum on 28 January) is for projects planned for the three-year period up to 1980-81.

Britain's aid programme to the Sudan, currently planned at over £7 million a year, including £2.8 million technical co-operation, gives priority to the development of renewable natural resources and communications. Most of the projects to be financed under the new grant have already been agreed with the government of Sudan.

UK industry gains £11m from aid

British industry received some £11 million in December from orders following grants and loans to the developing countries made by the Ministry of Overseas Development under the aid programme, and administered by the Crown Agents.

The following were among the largest contracts accepted for financing in December, including earlier contracts now accepted for reimbursement from aid funds: ring frames for Bangladesh (£540,379) from Platt Saco Lowell Ltd, Accrington; titanium dioxide for India (£363,835) from Tata Ltd, London; a ramped cargo vessel for St Vincent (£233,000) from Rotork Marine Ltd, Reigate, Surrey; and tractors for Sierra Leone (£94,173) from Unitrac Ltd, Windsor.

Go ahead given for £28m Sealink ferries

William Rodgers, Secretary of State for Transport, announced on 23 January his approval of a new ship order for the British Rail ferry fleet. The new ship is needed for the cross-Channel route from Dover to Calais.

Mr Rodgers said that he was delighted to have been able to approve this important investment. 'It is a further indication of my belief in a bright future for British Rail's operations. It is good news for UK ship yards and good news for the traveller, who is rightly looking for high standards of comfort and convenience.'

The order for one ship will be placed as soon as possible. Another is expected to follow shortly. The total value of the two ships is estimated at £28 million.

The new ships will each be capable of carrying 1000 passengers and 300 cars or 60 commercial vehicles. A similar ship is already being built at Harland and Wolff's Belfast yard for the Stranraer-Larne service.

THE stages agricultural and construction equipment events

Technical Help to Exporters (THE), the export advisory service of the British Standards Institution, is staging a seminar on 14 March giving an in-depth look at construction equipment regulations and approval procedures in the Federal Republic of Germany.

Three speakers – two from the Fachausschuss Tiefbau, the approval organisation concerned with operators' safety and environmental protection, and one from the TÜV, the approval organisation concerned with road vehicle requirements – will be detailing approval procedures and using slide transparencies to illustrate equipment features which are, or are not, acceptable in the Federal Republic of Germany.

On 15 March, THE is holding a half-day conference, covering the export of agricultural equipment, organised in association with the Agricultural Engineers Association, the Ministry of Agriculture, Fisheries and Food, and the Institution of Agricultural Engineers.

Speakers, from these organisations and from THE, will discuss the general requirements that govern occupational safety, noise control and environmental protection as well as specific legislation on agricultural equipment and machines. During the conference a proposed new service which will provide comprehensive assistance to exporters will be introduced and manufacturers' comments on the service will be sought.

The venue for both events is the Metropole Hotel in the National Exhibition Centre, Birmingham, and the fees are £40 plus VAT to THE members, and £50 plus VAT to non-members (with £10 reduction for second and subsequent delegates from the same organisation) for the construction equipment seminar, and a standard £15 plus VAT for the agricultural equipment conference. Delegates wishing to attend both events will be entitled to a £5 reduction on the fee for the agricultural conference.

Reservations can be made by contacting the Promotion Services Department, British Standards Institution, Maylands Avenue, Hemel Hempstead, Herts, tel. 0442 3111. Non-members must send remittance with reservation (cheques made payable to the British Standards Institution).

Big increase in sales of British foodstuffs to Canada

Exports of British foodstuffs to Canada were worth £54 million in 1977, it was announced this week – an increase of more than one-third compared with 1976.

To capitalise on this the British Overseas Trade Board will provide financial support for a seven-week promotion of British food to be run by Woodward Stores Ltd, a departmental store chain in western Canada. The promotion will run from 26 June to 12 August.

Woodward Stores are to buy an extra £1 million of British foodstuffs for their 20 stores in Alberta and British Columbia.

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All advertisement inquiries and bookings should be addressed to our advertisement department, at 13 Great James Street, London WC1, telephone 01-242 9478.

Scottish chambers to send oil mission to Brazil

Dundee and Tayside Chamber of Commerce and Industry is organising an oil-related trade mission to Brazil, from 27 to 30 June under the banner of the Scottish Chambers of Commerce.

The mission will be in Brazil for six days prior to the Latin American oil show and will remain a few days after this major energy event closes. This extended period will allow participating companies sufficient time to complete their business discussions in Brazil.

This will be a BOTB-supported mission and approved companies will qualify for £405 subsidy subject to the usual outward trade mission scheme conditions.

Companies interested should contact John Aitken, deputy director, Dundee and Tayside Chamber of Commerce and Industry, Chamber of Commerce Buildings, Panmure Street, Dundee, tel. 22122, telex 76243.

Blue Circle to present technical seminar in Peking

Blue Circle Group is presenting a technical seminar in Peking on 17 May at the request of the China Council for the Promotion of International Trade.

Eight papers will be read on technical matters concerned with the manufacture of cement, covering fuel economy, quality control and plant operation.

City visit from the Philippines

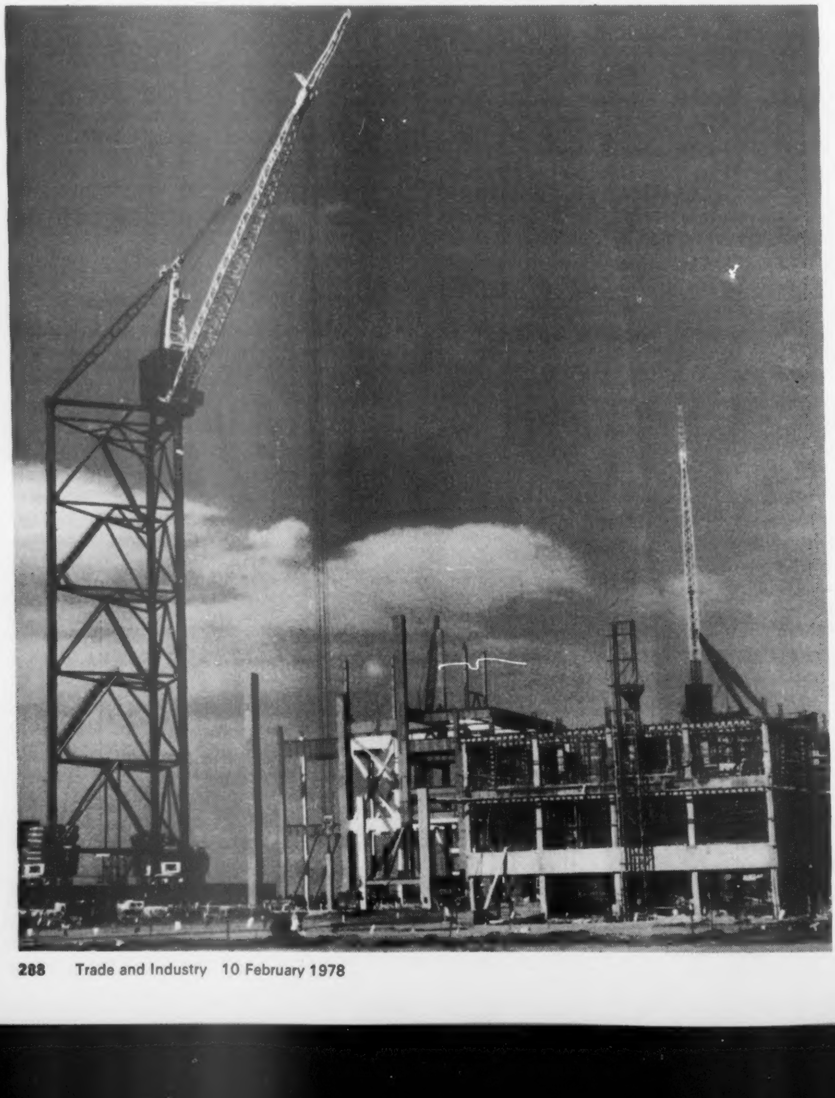
As a result of the Committee on Invisible Exports City of London Conference held in Manila almost a year ago, a group from Manila arrived in the City of London for a week of informal discussions. Sponsored by the Committee on Invisible Exports and the British Overseas Trade Board, the group was led by A. R. Brinas, senior deputy governor, Central Bank of the Philippines, and A. M. Barcelon, president of the Bankers Association of the Philippines.

The group visited the Stock Exchange, Lloyd's of London, members of the British Insurance Association, some discount houses, and the London commodity exchanges. They were received by the governor of the Bank of England and the Lord Mayor.

They held meetings with Barclays Bank International Ltd; Guinness Mahon and Co Ltd; Hongkong and Shanghai Banking Corporation; Morgan Grenfell and Co Ltd; N. M. Rothschild and Sons; and Samuel Montagu and Co Ltd.

Butters giant derrick in action in South Africa

Butters Cranes Ltd, of Glasgow, designed and built this giant derrick now operating in South Africa. Constructing the Duvha power station at Witbank, the 100-ton derrick has been purchased by the Dorman Long Vanderbijl Co for £300,000. Handling large pre-fabricated structures and machinery components, the Butters crane provides a total lifting height of 150 m and a maximum radius of 73 m. The bogie-mounted tower, 100 m high, provides additional mobility enabling crane duties to be carried out over a very wide area.



Chamber organises Arab seminar

The London Chamber of Commerce and Industry will run a one week non-residential course from 27 February to 3 March, and 17 to 21 April which aims to give participants a closer understanding of the Arab world. This will include an in depth study of the motivating factors and history which shape Arab character and behaviour and the course will also provide a working knowledge of colloquial Arabic.

Further details are available from the chamber, tel. 01-248 4444 ext. 210.

Chamber to hold Yemen debriefing meeting

Following its BOTB supported trade mission to the Yemen Arab Republic from 18 February to 1 March, the London Chamber of Commerce and Industry will hold a debriefing meeting at the chamber on 23 March at 11 am.

The mission is composed of 15 firms representing a wide spectrum of goods and services including banking, consulting, civil and structural engineering, architecture, general consultancies, ironmongery, agricultural machinery and heavy vehicles.

Further information about the debriefing is available from the chamber, 01-248 4444 ext. 39.

ECGD addresses

The Export Credits Guarantee Department's head office is at Aldermanbury House, Aldermanbury, London EC2P 2EL. (Tel. 01-606 6699). ECGD has 10 local offices in various parts of the United Kingdom, and these are listed from time to time in *Trade and Industry*.

Trade missions organised for engineers

In conjunction with the British Overseas Trade Board, the Engineering Industries Association are organising trade missions designed for engineers.

There will be a mission to west Africa from 6 to 30 September, which will spend two working weeks in Lagos and the third in Accra. From 9 to 30 September a mission will go to Australia and New Zealand, spending a week in Sydney, a week in Melbourne and a week in Auckland.

Further information about these missions can be obtained from Susan Green tel. 01-863 9188.

Notices to importers

Issued by the Department of Trade, Import Licensing Branch, Charles House, 375 Kensington High Street, London W14 8QH. Telephone inquiries should be addressed to the number at the end of the notice.

1659: Iron and steel – imports from Romania

As announced in *Trade and Industry*, 3 February, page 195, on and after 1 February 1978 the importation into the UK of the following iron and steel products originating in Romania may be effected only under an individual licence issued by the Department of Trade:

Tariff heading	Description of goods
ex 73.07	Blooms, billets, slabs and sheet bars (including tinplate bars), of iron or steel, rolled.
73.08	Iron or steel coils for re-rolling.
73.09	Universal plates of iron or steel.
73.10	Bars and rods (including wire rod), of iron or steel, hot-rolled, forged, extruded, cold-formed or cold-finished (including precision-made); hollow mining drill steel.
73.11	Angles, shapes and sections, of iron or steel, hot-rolled, forged, extruded, cold-formed or cold-finished; sheet piling of iron or steel, whether or not drilled, punched or made from assembled elements.
73.12	Hoop and strip, of iron or steel, hot-rolled or cold-rolled.
73.13	Sheets and plates, of iron or steel, hot-rolled or cold-rolled.
73.14	Iron or steel wire, whether or not coated, but not insulated.
73.15	Alloy steel and high carbon steel in the forms mentioned in headings nos 73.06 to 73.14.
73.18	Tubes and pipes and blanks therefor, of iron (other than of cast iron) or steel, excluding high-pressure hydro-electric conduits.

Licensing arrangements

Applications for individual import licences will be considered on a case by case basis for goods in transit on or before 31 January 1978 and for goods shipped on or after 1 February 1978 and due to arrive in the UK on or before 31 March 1978, in respect of imports at a rate approximating to 25 per cent of total deliveries of iron and steel from Romania in 1976. Traders are advised that, in considering applications, account will be taken of imports effected during the period 1 January 1978 to 31 January 1978, and that applications for goods in transit (which should be accompanied by copy bill of lading or evidence that the goods were loaded on a train) must be received in Import Licensing Branch no later than 17 February 1978. Traders are therefore invited to make application on form ILB/A to Import Licensing Branch at the address shown above.

Surveillance licensing arrangements

All surveillance licences issued in respect of any of the products listed above and originating in Romania were revoked with effect from midnight on 31 January 1978, and those products are now subject to the licensing arrangements described above. Traders should note however that iron and steel products originating in Romania and falling within tariff headings 73.01 or 73.02 are not affected by the revised arrangements and remain subject to current surveillance licensing requirements.

Inquiries: Import Licensing Branch, tel. 01-603 4644 ext. 280.

1660: Validity of import licences granted under transitional measures

Traders should note that import licences for certain restricted textiles, granted under the transitional measures set out in NTI 1649, *Trade and Industry*, 6 January 1978, are only valid for goods shipped by 31 March 1978. No variation of this condition will be permitted.

Import licences for goods shipped after that date will only be granted against valid export certificates issued by the relevant authorities in the exporting country.

Traders are asked to return to Import Licensing Branch any unused or partially used import licences granted under the transitional measures as soon as it becomes known that shipment will not take place before 31 March 1978.

Inquiries: Import Licensing Branch, tel. 01-603 4644 ext. 311/367.

1661: Taiwan – UK residual textile quotas

The quotas set out below are national quotas not affected by community arrangements. As was the case in 1977, allocations will be made on the basis of past trade returns submitted by traders in response to NTI 1606, *Trade and Industry*, 25 March 1977, and traders need not therefore submit further statements, but should await receipt of their licence from Import Licensing Branch.

Category	Tariff heading/Description of goods	1978 quota (m^2)
N1	ex 55.08 Terry towelling and similar terry fabrics of cotton ex 58.04 Woven pile fabrics and chenille fabrics, of polyester/cotton or containing more than 50% by weight of cotton ex 59.13 Elastic fabrics and trimmings containing more than 50% by weight of cotton	9 395
N2	ex 61.01/ex 61.02 Aprons, overalls and dungarees, of polyester/cotton or containing more than 50% by weight of woven cotton	112 150
N3	ex 61.01/ex 61.02 Articles of apparel used for sports, of polyester/cotton or containing more than 50% by weight of woven cotton	215 455
N4	ex 61.02 Babies' outer garments of polyester/cotton or containing more than 50% by weight of woven cotton	16 185
N5	ex 61.05 Handkerchiefs of polyester/cotton or containing more than 50% by weight of woven cotton	NIL
N6	ex 61.06 Shawls, scarves, mufflers, mantillas, veils and the like, of polyester/cotton or containing more than 50% by weight of woven cotton	14 700
N7	ex 62.02 Table linen, toilet linen and kitchen linen, curtains (other than net curtains) and other furnishing articles, of polyester/cotton or containing more than 50% by weight of woven cotton.	9 395
N8	Floorcloths, dishcloths, dusters and the like, of polyester/cotton or containing more than 50% by weight of woven cotton	9 395

Traders should note that the coverage of categories N7 and N8 have been adjusted to take account of the fact that certain goods previously falling under UK national quotas are now contained in EEC quotas, as set out in NTI 1649, *Trade and Industry*, 6 January 1978.

Inquiries: Import Licensing Branch, tel. 01-603 4644 ext. 311.

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Oil confidence returns in south-east Asia

Since the first offshore south-east Asia exhibition in 1976 the regional petroleum industry has been in recession, but now confidence is returning and there are signs of renewed activity. As Singapore prepares to host a second offshore south-east Asia exhibition later this month, Alan Ingle, second secretary commercial at the British high commission in Singapore, reports on the development of oil industry in the region and examines the prospects for British suppliers.

Two years ago the petroleum industry's first major exhibition and conference to be held outside of the United States and Europe was staged in Singapore[1]. The exhibition was a success. And it provided British companies, many of them with experience in the North Sea, with an opportunity to focus their attention on the region.

A second offshore south-east Asia exhibition and conference will be held in Singapore from 21 to 24 February 1978 at the Hyatt Hotel. Exhibition space has been completely sold out. Some 400 local and international companies from 15 countries will be participating, including 34 British exhibitors. Trade missions sponsored by the Council of British Manufacturers of Petroleum Equipment, the Association of British Offshore Industries and the Dundee and Tayside Chamber of Commerce will be in Singapore for the event, which is confidently expected to attract a large number of petroleum industry engineers and executives.

In the intervening two years the regional petroleum industry has been in recession. Little new exploration has taken place. Many servicing companies have had to reduce their staff to a holding operation. But there are now signs of activity starting up again. Contract terms have been or are being renegotiated between petroleum companies and Pertamina (Indonesia's state petroleum corporation) and Petronas (the state corporation of Malaysia).

No one in the industry pretends that 1978 is likely to bring more than a modest upturn in business in the region and activity will still fall far short of the peak years of 1973-74 – but confidence is returning and in the longer term the potential is significant.

Indonesia's signs of recovery

Investment in the Indonesian oil industry, which has been in a severe recession over the whole of 1976 and 1977, shows signs of recovery. The difficulties between the Indonesian government, Pertamina, and the foreign oil contractors, caused by the 'renegotiation' of the contract terms in early 1976, have been eased in the course of 1977. Some companies consider the revised terms are sufficient to justify at least limited investment in new exploration. Some also believe that they will make profitable certain small oil fields previously considered uneconomic. There is believed to be a number, particularly those situated near existing production facilities, which could now be put on stream, although the quantity of oil thus produced would probably not be great and would deplete rapidly. On the other hand, it is still doubtful whether the present terms will be attractive enough for the companies to justify major development expenditure on small, isolated fields.

Companies are now permitted to write off 100 per cent of their non-capital expenses in the first year of production but are allowed to depreciate their capital assets only over seven years. Uncertainty persists about the official United States attitude towards payments made by the American producers to Indonesia. The Internal Revenue Service has yet to rule definitively on whether these are taxes or royalties (which are not subject to full United States tax relief) and this remains a factor inhibiting new investment by some companies.

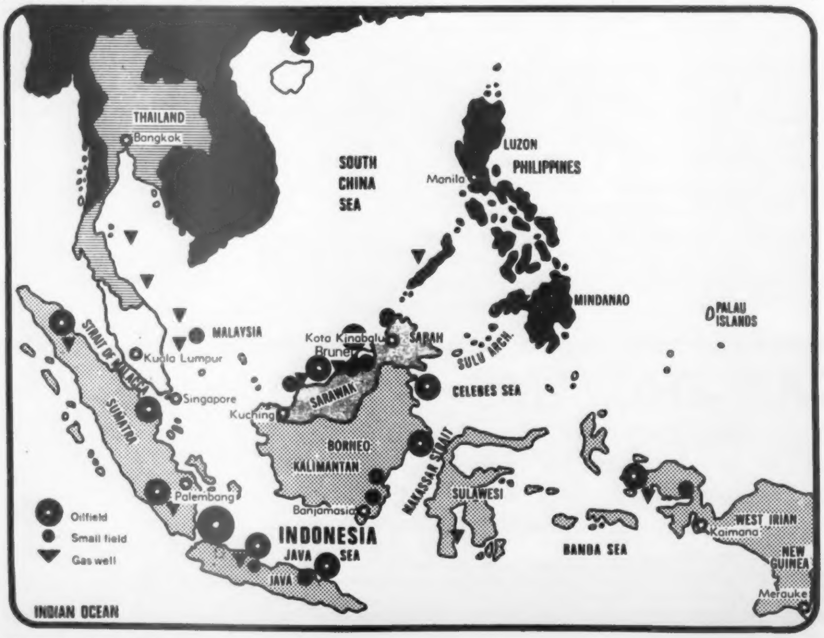
The construction of two liquefied natural gas plants (by Bechtel) is now near completion, and there are plans to extend both. Much depends on the attitude of the United States government towards imports of LNG from Indonesia, and on the scale of the expected growth in demand in Japan. A feasibility study is being undertaken by the Kuwaiti government and Pertamina for a 200 000-barrels-per-day oil refinery on Batam Island. This would process heavy Kuwaiti crude. The project, has, however, been under study for some years and Kuwait has not yet made any financial commitment.

Discussions are also continuing between Dow Chemicals and the Indonesian government about a possible oleofinic complex in north Sumatra. Again, however, this project has been discussed for some years, and the projected petrochemical complex in Singapore will be a new factor to be taken into account. On the other hand, substantial investment will continue in fertiliser production, based on feedstock from Indonesia's gas field.

Malaysia hopes to increase output

Total oil production in Malaysia was over 200 000 barrels per day by mid-1977. With Exxon's Trengganu production to come on stream this year total output should be increasing. But at the end of 1977 Petronas asked the producers to cease flaring associated gas. As a

SOUTH-EAST ASIA'S OIL AND GAS ACTIVITY
(Map: Courtesy of *PetroMin Asia Journal*)



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[1] See *Trade and Industry*, 6 February 1976.

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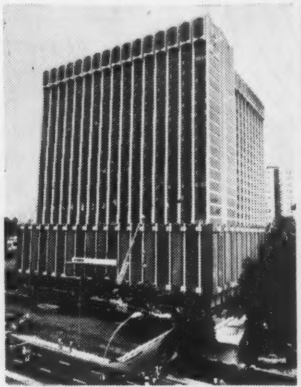

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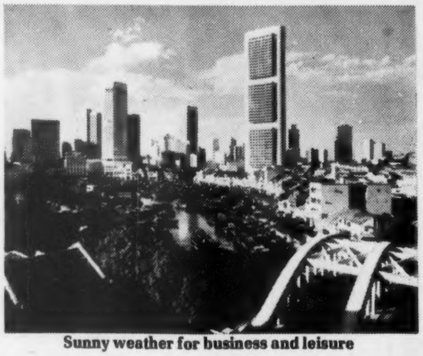

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consequence production is now down to some 175 000 barrels per day.

Of total production 105 000 barrels per day is produced from Sarawak. Sarawak Shell has been in production for many years – originally onshore from Miri but now offshore from Fairly/Baram, Baronia, Tukau and West Lutong fields. Other fields have been discovered and will in due course be linked to maintain production. A small refinery at Lutong refines some 45 000 barrels per day; the remainder is exported as crude. Refined products are consumed locally and exported to surrounding areas in Sarawak, Sabah and the Philippines.

The balance of about 70 000 barrels per day comes from Sabah. Exxon's Tembungo field is a single buoy mooring some 50 miles off the west coast from Tuaran and produces about 13 000 barrels per day; but the field is likely to be exhausted by the early 1980's. About 55 000 barrels per day is piped ashore from Samarang and ERB West fields, 24 miles to the north-west of Labuan, to a recently opened tank farm on Labuan Island. A new discovery in January this year, thought to be larger than Semarang, has been made 50 miles north-east on well 'Ketam no. 1'.

Total Malaysian oil reserves are estimated at 1000 million barrels, while recoverable gas reserves are thought to be around 18 trillion cubic feet. Malaysian petroleum consumption totals about 3½ million tonnes per annum, for which much of the crude is imported from the Middle East to the major refineries of Shell at Port Dickson and Esso at Negri Sembilan. Some refined products are imported from Singapore. BP, Castrol, Caltex and Mobil engage in distributing and marketing.

Main future hopes lie offshore in the South China Sea and prospects are considered bright since the geology appears promising; water depths are relatively shallow and climatic conditions not unfavourable for exploration. Large acreages remain unlicensed at present (particularly offshore west Malaysia) and Petronas may be in a position later in 1978 to conduct a new round of licensing.

Exxon has discovered hydrocarbons in commercial quantities 14 miles north-east of Kuantan (in Trengganu waters), off the east coast of Peninsular Malaysia in the South China Sea. Production drilling is being undertaken at Pulai and is about to start at Tapis. A submarine pipeline will join the two structures and crude will be pumped to tankers from a single anchor leg storage system. There is a third field at Bekok. An 'encouraging' show of oil and gas has also recently been discovered at Palas no. 1 exploration well 12 miles north-east of the Tapis field.

Shell has discovered major gas fields (Luconia Group) off the Sarawak coast 80-120 miles from Bintulu which are thought to be capable of producing some 1000 million cubic feet per day or some six million tons per annum of LNG.

Discussions with the Malaysian government (ie Petronas – the national oil company) are still proceeding, but pending agreement plans are well-advanced to exploit these reserves in a joint venture with Mitsubishi Heavy Industries and Petronas. Petronas is likely to have a majority share (65 per cent) in the new company 'Sarawak LNG' and the minority will be split between the other two parties. The estimated total investment (at current prices) to bring the plant on stream by about 1982 will be approximately US$2,500 million – including some US$700 million committed by the Malaysian International Shipping Corporation (a government body) to buy a number of LNG carriers from France.

Continental is also reported to have hydrocarbons in its concession area off the coast of Pahang. The reserves are thought to have commercial potential, although the company has no agreement yet with Petronas on exploitation and no decisions have been taken on possible transportation or processing facilities.

Other areas are not so promising. Much of the Malaysian half of the Malacca Straits has been explored and found dry. Territorial waters to the east of Sabah have been explored by Aquitaine and Japanese interests without success. Onshore prospects do not appear encouraging. Peninsular Malaysia and Sabah have been fairly well explored. In Sarawak, Shell has been prospecting onshore for some years. Large quantities of coal have been discovered but no further commercial oil reserves have been found.

Brunei concentrates offshore

In 1977 81 per cent of the total acreage of Brunei was covered by petroleum mining agreements. Offshore, all concessions are held by Brunei Shell Petroleum Co Ltd, a subsidiary of Shell in which the Brunei government holds a 50 per cent equity. Onshore, concessions are also held by Sunray Borneo Oil Co and Ashland Oil Co, but Brunei Shell Petroleum is the only company actively exploring and producing.

Exploration is at present concentrated offshore, though land drilling is programmed at Belait and Rasau this year. Development of the Magpie field, a recent discovery by Brunei Shell Petroleum is planned to begin in 1978-79. Onshore, significant success has only been achieved in the 48-year-old Seria field, the largest oil field in Brunei.

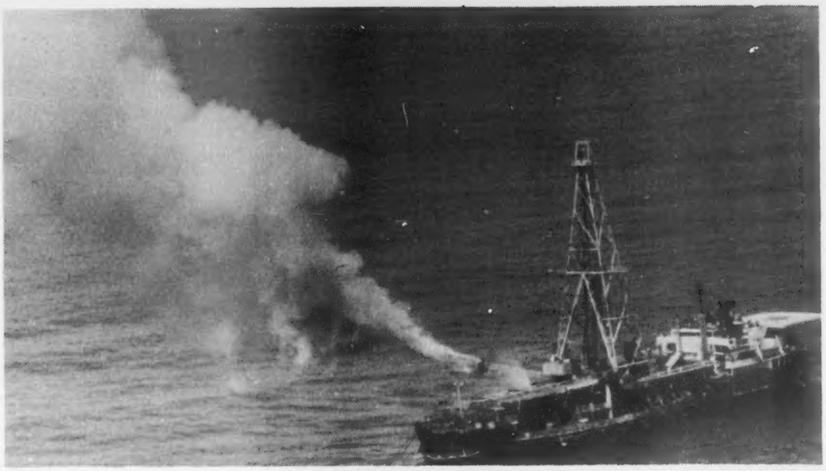
Crude oil production is about 220 000 barrels per day from five fields. Of this amount 190 000 barrels per day are produced offshore from four fields; South-West Ampa, currently the biggest producer with 100 000 barrels per day, Champion, Fairley and Fairley Baram. The latter straddles the offshore border with Malaysia, and offtake is shared with Sarawak Shell under a unitisation scheme. Production peaked in 1973 at 230 000 to 250 000 barrels per day with the bulk of production increasingly shifting from the South-West Ampa field to the Champion field.

Brunei is also a substantial producer of liquified natural gas. Brunei LNG Ltd was formed in 1969 to build and operate a plant in Brunei to liquefy natural gas for shipment to Japan. This involved an investment programme of more than 600 million Brunei dollars. The Brunei government, Shell and Mitsubishi (Japan) each hold a 33⅓ shareholding in both the liquefaction company and the trading company (Coldgas Trading Ltd). The LNG plant, situated at Lumut, came on stream in 1972 and current output is about 760 million standard cubic feet per day. Total production is exported to Japan in a fleet of seven chartered tankers. Supply of LNG to Japanese customers is on a 20-year contract and the arrangements allow for a basic quantity of 5 million tons per year to be delivered.

Oil refining within Brunei is restricted to regular petroleum diesel and LPG for local requirements. The plant handles approximately 2000 barrels per day.

Philippines' search for indigenous oil

With 25.8 per cent of the total import bill for the Philippines in 1977 devoted to the purchase of crude oil and related oil products, a concentrated programme of exploration con-



Drill ship *Glomas Tasman* leased by the Amoco oil consortium flares oil drawn from an oil trap about 6000 ft below sea level at Cadlao off Pelawan Island in the Philippines.

tinues for indigenous sources. So far the focus has been upon the north-west coast of the island of Palawan, where four wells have been drilled. Of these, Nido I, South Nido I and Cadlao I have all been reported as being productive, while the fourth, North Nido, was said to have been dry. The drillings are all located some 20 miles offshore and in some 200 ft of water. Another well is to be drilled a few miles south-east of Cadlao I and is referred to as Signal Head I. A confirmatory well related to the South Nido I strike and some 2½ miles to the west has also been started in an area which is referred to as the West Lobe prospect.

The activity is spread between three separate contractors who, under Philippine government oil-exploration policies, have been awarded service contracts to drill in specific areas by the Department of Energy. They are Cities Service International Inc of Houston, Texas; Amoco Philippines Inc of Chicago, Illinois; and the Signal Group. Cities Service International Inc comprises five United States and Filipino oil companies who are responsible for the Nido drillings and are now drilling the West Lobe. Amoco Philippines Inc is a subsidiary of the American oil company responsible for Cadlao I which was flared successfully on 21 October 1977, and is now drilling a confirmatory well nearby. The Signal Group is a 15-member, all-Filipino consortium now engaged in drilling Signal Head I.

But not all the action is centred off Palawan. Some 150 miles to the north-west of Palawan, on the Reed Bank near the Spratley Islands, in 200-250 ft of water is another Amoco involvement leading seven Filipino partners, and known as the Reed Consortium. Its contract with the Philippine government calls for one well a year to be drilled over the next seven years; so far one has been completed – Sampaguita I – which was first flared in August 1976.

On land in Isabela Province, 180 miles to the north-east of Manila, the Philippine National Oil Company Exploration Corporation is conducting a drilling programme at Reina Mercedes and there has already been encouraging evidence of natural gas reserves. This site is some 25 miles distant from one which the Standard Vacuum Oil Corporation (Stanvac) spudded and capped in 1957. But reserves at Reina Mercedes are small and are expected to be developed as a bottled gas source only.

There are three petroleum refineries in the Philippines. Two are in Batangas Province and are operated by Shell and Caltex, and a third in Bataan once owned jointly by Esso and Mobil but now owned by the Philippine National Oil Company. A fourth refinery at Cavite has closed down in order to concentrate Philippine National Oil Company production at Bataan.

The first oil in commercial quantities in expected to be brought ashore from the wells off the north-west of Palawan in early 1979. But the unanswered question is how significant are these new oil finds in and around the Philippines and to what extent they will prove to justify commercial exploitation.

Thailand's dependence on imports

Thailand depends on imported petroleum for more than 80 per cent of its energy requirements and petroleum imports have put Saudi Arabia third from top among the country's foreign suppliers. It is against this background of a major drain in Thailand's foreign currency resources that the Thai government is pushing ahead with arrangements to exploit reserves of natural gas found under the Gulf of Thailand by the Union Oil Company and Texas Pacific.

A target date of January 1981 has been set for the completion of a pipeline and natural gas to go on stream. The Natural Gas Organisation of Thailand (NGOT) has been set up with an initial capital of 5 million baht to implement the project. There has been a recent further find of gas and some oil in the Gulf by Amoco Thailand and Idemitsu Exploration (Thailand) but viability has still to be proved.

The Union Oil Company's field of Nakhon Si Thammarat is estimated to contain reserves of 1 trillion cubic feet. The Texas Pacific Company's field of Songkhla appears to be even bigger, with reserves estimated at 3 trillion cubic feet of gas. Together, these two fields are expected to be able to supply up to 450 million cubic feet of natural gas per day for 20 years and there are hopes that further exploration may uncover further reserves. Price and marketing arrangements are being negotiated between the government and the Union Oil Company and the British Gas Corporation is acting as legal and technical adviser in these negotiations.

The exploration and producing company will sell the gas at the well head to the NGOT, which will then move the gas by pipeline under the sea and overland to points of consumption and market the gas to consumers. This means that the NGOT will own and operate the natural gas pipeline system. The pipeline and production facilities will represent one of the biggest construction projects ever undertaken in Thailand. Costs in the region of 11,000 million baht have been mentioned.

Initially the government intends to pipe the gas ashore at about 150 million cubic feet per day. At first it will be used mainly for fuelling thermal power stations as a substitute for imported fuel oil. When it is in full flow it will be used for other purposes too. Propane and butane could be separated and bottled for use as domestic cooking gas. If there is sufficient condensate, it will be used for liquid petroleum production. In the longer term, natural gas is seen as a basis for a number of heavy industries, including steel, fertilisers and petrochemicals.

Apart from the natural gas project, the Thai offshore petroleum scene has been rather quiet. Exploration companies have been evaluating the results of earlier activities and there has been a general slow-down in activity. Some companies are believed to have been awaiting the outcome of the NGOT negotiations with Union Oil before taking decisions about further exploration.

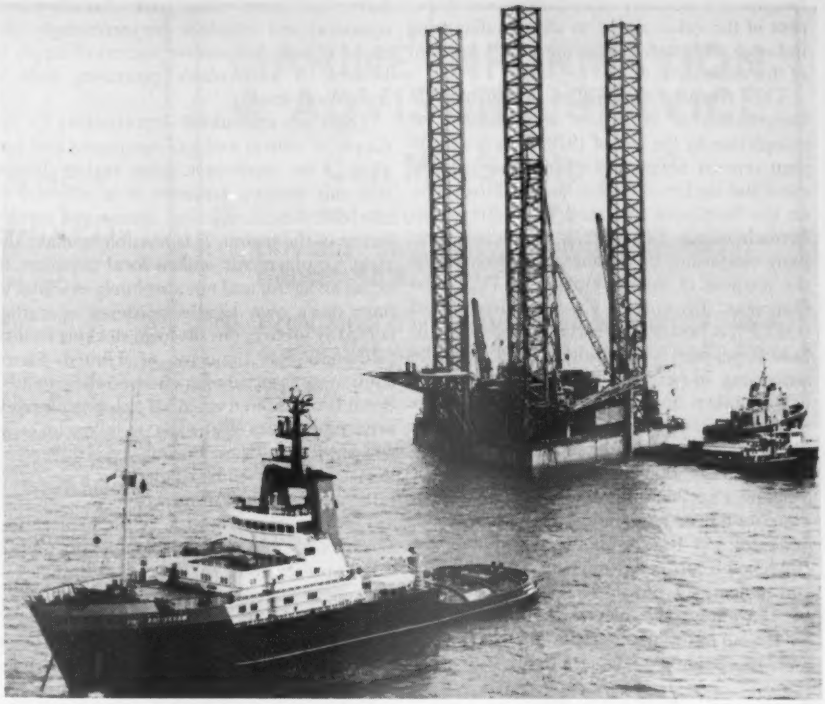
Onshore, exploration is being continued by the Defence Energy Department in the north and encouraging signs have been reported from exploratory wells in Lampang Province. The department is also conducting surveys in other pockets of tertiary sediments in the northern provinces, including Chaing Mai, Phrae and Chiang Rai. Meanwhile, the department's oil field and refinery at Fang, in Chaing Mai Province has been reported to be operating on a self-sufficient basis, being able to dispense with government subsidies. The refinery is now producing diesel fuel and lubrication oil.

The Department of Mineral Resources (DMR) is continuing its evaluation of the oil shale resources at Mae Sot in Tak Province, and interesting reserves of oil shale are being delineated. Proposals were put forward for a DMR team to make a study tour of the oil shale operations in China. However, in view of the natural gas project, it would appear that actual development of Thailand's oil shale resources could be relegated to the distant future, and that, for the present, they could constitute a strategic reserve.

With capacity of the three petroleum refineries falling short of domestic demands, the Thai government would like expansion of the refineries to proceed as quickly as possible. Talks have recently been held between the government and the refining companies – Summit, Esso and Thai Oil. Thai Oil has submitted detailed proposals to increase capacity from 65 000 to 130 000 barrels per day. Summit and Esso have not submitted detailed plans yet, though both companies have indicated their interest in expansion.

Vietnam's exploitation talks

Offshore oil exploration off the south Vietnam coast came to a halt with the fall of the Thieu government in 1975. Vietnam's Department of Oil and Natural Gas has latterly been negotiating with a number of major oil companies on



A rig is brought to Singapore for servicing.

the granting of exploration and exploitation concessions. These talks have reached an advanced stage with three west European companies. Negotiations have been on the basis of service contracts whereby the companies concerned have the right to buy a proportion of any oil produced at a discount.

The Vietnamese intend to exploit some blocks themselves. To this end, they have constructed the basic elements of an offshore base at Vung Tau (about 35 miles from Ho Chi Minh City). But there will almost certainly be openings for foreign companies to provide services in support of any eventual offshore oil drilling operations carried out by Vietnam. The Norwegian government has recently granted about £1 million worth of aid to be used to construct a training centre for oil technicians just outside Ho Chi Minh City.

Bangladesh's drilling continues

Six overseas companies were originally granted exploration licences by the government of Bangladesh but four of these have since withdrawn. The remaining two companies, Union Oil Co (USA) and Bengal Oil Co (Japan Petroleum Development Corp /Toya Group), are continuing their drilling operations in the Bay of Bengal under production-sharing agreements.

In January 1977 Union Oil Co struck gas deposits in the Bay of Bengal at a location approximately 56 miles south-west of Chittagong with well flows of 50 million cubic feet per day. The Bangladesh Oil and Gas Corporation is planning the construction of a pipeline to provide energy to serve industry and the domestic network in the greater Chittagong area.

India's offshore development

India's largest development is the offshore Bombay High field, producing 60 000 barrels per day – 3 million tonnes per year which is estimated could increase to 10 million tonnes by 1981-82. The first processing/pumping platform has now been added to the existing five production platforms. There are 12 wells in operation, and it is estimated that as many as 100 wells could be drilled over the next decade.

At present crude is taken ashore by shuttle tanker, but both oil and gas submarine trunk lines are currently being laid from the Bombay High field to the new onshore terminal at Uran. Pipeline Technologists of London is overseeing this work while another British company, Humphries and Glasgow, has completed studies for construction of the Uran onshore terminal. From Uran, the pipelines will run across the Bombay inlet to the refinery and power station at Trombay. Land and Marine Ltd has one part of this contract. Further plans onshore include extending the Uran terminal and pipelines to a fertiliser complex proposed at Rewas.

Other offshore fields are Bassein North (oil and gas) and Bassein South (gas) which lie between Bombay High and the coast. It is intended that production platforms in both fields will be linked by pipeline to the main trunk lines. There is also a proposal to extend the pipeline to an additional landfall on the Gujarat coast. But this is only at the stage of surveying alternate routes.

Further offshore exploration is taking place south of Bombay and will eventually extend along the whole west coast of India. Exploration in the Bay of Bengal has, so far, shown little result but exploration is being stepped up.

All exploration is controlled by two state-owned bodies: in the Arabian Sea by the Oil and Natural Gas Commission, and in the Bay of Bengal by Oil India Ltd.

There are considerable requirements for ancillary equipment and services in the fields of safety, diver-support and training, pollution control, subsea inspection and maintenance.

Singapore: the regional centre

Singapore plays an important supporting role as the regional centre for the petroleum industry, serving as a base for companies providing logistics support, supplies and services. Exploration companies, supplies and service companies – including consultants, geophysical and diving operators and drilling contractors – are all established there. They are supported by well-established financial, commercial and industrial facilities and a first-class communications network.

There are two major supply bases, one at Jurong on the south-west coast and the second at Loyang on the north-east coast. Between them they provide warehousing space and handling facilities to over 80 service companies. The Jurong base is well-equipped with a rapid loading system for water, fuel, drilling mud and cement. Both bases have been expanding steadily and there are plans for further expansion should the need arise. The Port of Singapore Authority has a small facility where coastal traffic supporting the land-based operations in Sumatra calls.

Since 'Offshore 1976' the two main bases have undergone a subtle change in use; in addition to supplying direct to rigs, they are also providing storage and shipment consolidation areas for shipping equipment to smaller bases in the area (such as Kuala Belait in Brunei or Kadut in Sabah) by flat-top barge or small coaster. This trend is expected to continue. And use of the bases is not confined to operations in south-east Asian waters. Fields as far away as Bangladesh and Bombay are serviced from Singapore and at least one company is using Singapore to consolidate equipment loads for its forward base in western Australia.

Singapore has also acquired a reputation for shipbuilding and ship-repairing and offers expertise in building the smaller type of vessels required by the exploration industry such as tug-boats, anchor-handling and supply vessels. Rig-building first started in the late 1960's and existing building capacity makes Singapore the third largest rig-building centre in the world. Both Marathon Le Tourneau and Bethlehem Steel have established subsidiaries and a third local yard has a management contract with the American Levingston organisation. A fourth yard has ties with Hitachi of Japan.

As late as 1975 the four yards had orders for more than 20 rigs in hand. Since then new orders have been scarce and some yards have been turning to other types of steel fabrication to keep their specialised labour force intact. But the situation is now improving and yards have recently secured orders for six jack-up rigs worth $240 million and orders for more could be forthcoming.

Singapore has five petroleum refineries, including those of Shell and BP, with a throughput capacity of over 1 million barrels of crude oil per day. During the last two years they have operated at about half capacity but have recently increased to nearly 60 per cent. With wharves capable of accommodating ships up to 93 000 tonnes and berthing facilities for VLCC's up to 335 000 tonnes, the refinery operated by Shell is the largest in Asia and one of the largest in the world. Petroleum products from Singapore supply the south-east Asia region, though refinery products are distributed as far afield as Japan, Australasia and the United States.

Petroleum represents a major element in

Singapore's economy contributing over 20 per cent of the value added to all manufacturing industry, although employing only 1 per cent of the work-force.

The recently established Petrochemical Corporation of Singapore is scheduled for completion by the end of 1979. This is a 50:50 joint venture between the Singapore government and the Development Bank of Singapore, on the Singapore side, and Japan-Singapore Petrochemicals Co (JSPC), a holding company established by Japanese shareholders for the purpose of investment in the PCS. The Overseas Economic Co-operation Fund (OECF), a Japanese government agency, will hold 30 per cent of the equity of the JSPC. The remaining 70 per cent of equity in the JSPC will be taken up by 23 Japanese companies including Sumitomo Chemical. The main plant, a naphtha cracker, is designed to produce annually 300 000 tonnes of ethylene, with Singapore's refineries providing the feed stock. Plans for downstream industries have yet to be finalised, but it is probable that plants for ethylene-glycol, polypropylene, vino-chloride and polyethylene will be established. The whole complex should provide opportunities for British equipment suppliers and possibly for consultancy services.

Prospects for British suppliers

Although the region's oil exploration industry is orientated towards American standards and equipment, Britain's expertise (acquired in North Sea operations) and the capability of British companies in the offshore supplies field have not gone unnoticed. Locally-based operators and suppliers are increasingly prepared to seek competitive sources of supply in Britain. A particularly promising field is equipment leasing.

There are undoubted opportunities for the supply of oilfield and gas equipment and services in the south-east Asian region. To get into this market, however, it is essential to establish a stock-holding, spares and service centre in the region. It is possible to make the right arrangements with a local company to act as an agent, and not absolutely essential to have one's own locally-registered operating company to carry out the local stocking facility (although the majority of United States equipment companies are here on the ground). But it is considered essential to have company service engineers on the spot to follow up sales and service inquiries. The market is difficult to break into and thus results are a medium rather than a short-term prospect.

The best opportunities in the exploration market are for equipment that does not have a sole application to the oil industry – equipment which is already of proven value, quality and efficiency, including pumps, generators, communications equipment, turbines, etc. Other opportunities exist in casings and the specialised down-hole products such as muds and cements; in supply operation such as boats and logistics; and specialised professional services.

The Indonesian government encourages service, supply and operating companies to have a 'real' presence in Indonesia and it is essential to have a good indigenous agent, if not a locally-established operation there. Little business can be done with buyers in Indonesia without visiting the country and establishing contact with Pertamina and the foreign companies operating there. Much the same could be said for Malaysia, where contact with Petronas will be essential.

The importance of making contacts in the countries of the region cannot be emphasised enough. Although most of the oil companies maintain regional offices in Singapore and in fact many sales negotiations may be concluded there, local ventures are and will become more and more important. However Singapore is, and will remain, an important market place and first port of call in this growing oil-producing region.

More about the opportunities

British firms who want to know more about the opportunities in south-east Asia can contact John Anderson of the Offshore Supplies Office, Alhambra House, 45 Waterloo Street, Glasgow G2 6AS, tel. 041-221 8777 ext. 462.

An alternative approach is to contact the offshore liaison officer at any of the regional offices of the Department of Industry.

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Overseas trade export services

Carol introduces weekly service to the Caribbean

CGM are to increase the frequency of their fully containerised service to the Caribbean to a weekly schedule, with vessels leaving Tilbury and Liverpool at eight to nine day intervals, with the addition of mv *Caraibe* to the Carol fleet.

Carol – Caribbean Overseas Line, the international consortium made up of France's CGM, Britain's Harrison Line, West Germany's Hapag-Lloyd and the Netherland's KNSM (with Horn Line as an affiliated member) became fully operational at the end of 1976 with the commissioning of its first vessel *Caribia Express*.

CGM's *Caraibe* is the sixth vessel to join Carol's fleet of purpose-built 21 knot, fully containerised ships and marks the completion of stage I in Carol's development programme. It offers a fully containerised, door-to-door service between Europe and the Caribbean.

Each company in the consortium has contributed vessels of a standard design and like her sister ships the *Caraibe* has a capacity of 1250 TEU and a cruising speed of 21 knots.

A deck-mounted travelling gantry crane makes each ship independent of port handling facilities. Ultimately when the few remaining destination ports still to install container gantries have completed their landward handling facilities, the on-board gantries will be removed allowing containers to be stacked three high on the top deck and increasing overall capacity to 1388 TEU per vessel.

Further information: circle 366

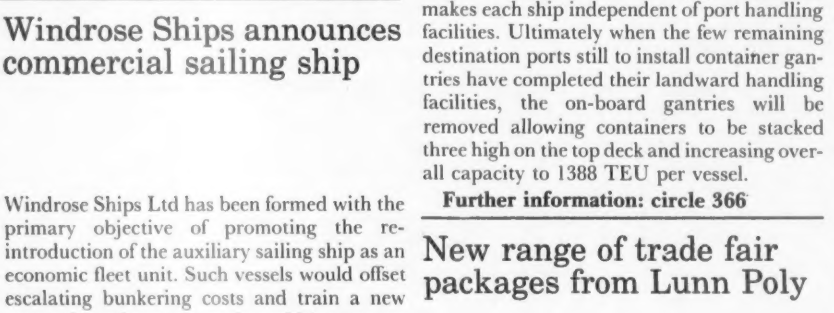
Windrose Ships announces commercial sailing ship

Windrose Ships Ltd has been formed with the primary objective of promoting the reintroduction of the auxiliary sailing ship as an economic fleet unit. Such vessels would offset escalating bunkering costs and train a new generation of seamen, and would harness an alternative source of energy for ships, when the effects of the world's dwindling oil resources become a reality.

International Sailiners, a division of Windrose Ships Ltd, is at present developing the design and operational data for the construction of a standard 12 000 dwt five-masted auxiliary barque. Versions of this ship will be available in container, bulk carrier or general cargo form with facilities for training

Further information: circle 367

The 12 000 dwt auxiliary barque designed by International Sailiners.



New range of trade fair packages from Lunn Poly

Lunn Poly has published details of their inclusive tours to 32 trade fairs and exhibitions in the period April to September. The packages include return air travel, accommodation and entry to the fair.

Among the events included are the Hanover trade fair, 19 to 27 April; the international exhibition of educational publishing in Bologna, 1 to 4 April; the Pitti/Donna ladies' fashion show in Florence, 1 to 4 April; the OTC offshore technology conference in Houston, 8 to 11 May; the Posidonia international shipping exhibition in Athens, 5 to 10 June.

Lunn Poly have been appointed the UK official travel agent for Interbimall, the international exhibition for woodworking machines to be held in Milan, 13 to 20 May, and are offering a variety of tours to this event.

Further information: circle 368

New permanent berth at Birkenhead arranged

The Clan/Ellerman/Harrison joint service from Birkenhead to the Red Sea and east Africa has reached an agreement with the Mersey Docks and Harbour Co for the exclusive use of nos. 1 and 2 Vittoria Terminal, Birkenhead. This modern terminal is well equipped and spacious, and the joint service lines will be able to offer continuous receiving for all their vessels in the fortnightly service.

Lorry appointments will continue to assist the regulation of traffic flows to the ships, and bookings will continue to be accepted through the loading brokers, Staveley Taylor and Co, with customary special arrangements for heavy lifts and hazardous cargo.

The first vessel to use the new facilities will be the *Clan Menzies*, receiving from 10 to 23 February 1978.

Further information: circle 369

Joint-venture scheme for importing engineering products

Newman Industries Group is promoting an idea to simplify the selection, buying, transportation and financing of all kinds of engineering products for Ivory Coast importers at the British trade fair at Abidjan which closes on 10 February.

The group is already operating what it calls 'joint venture' projects. In these, the group links suppliers and buyers so that finance, documentation, shipping and stock control are taken care of under a single agreement. The agreements can run continuously, if required, with Newman phasing shipments, financial control and so on, according to importers' needs.

Further information: circle 370

New Euro-Ship-Service introduced

Coubro and Scrutton is among a number of independent companies which have joined together to form Euro-Ship-Service to provide a chain of services to shipping from Scandinavia through Europe to France, including the United Kingdom.

Member companies will pool their resources and knowledge to provide a round-the-clock service and continuity between ports and countries.

The main activities of the group are cargo securing, including heavy lifts; hold and deck cleaning, overhaul and supply of cargo handling equipment; container repairs; supply and overhaul of container securing and lifting equipment; repair and supply of PVC container and trailer tilts; safety equipment surveys and all general work on board ship.

The member companies will all retain their own individual identities and the principal companies participating are: Coubro and Scrutton (M. and I.) Ltd, London (in association with W. F. White Ltd, London), Liverpool and other United Kingdom ports; Lundby Skeppsservice, Gothenburg and also covering all Scandinavian ports; Carl Heinz Scheper, Hamburg, Bremen and Bremerhaven; NV Perfect, Rotterdam, Amsterdam, Flushing and other Dutch ports; Simon Smits Natie NV, Antwerp and Zeebrugge; Compagnie Nouvelle de Manutentions, Le Havre.

Further information: circle 371

New division formed for medical centres overseas

Interplan hospital projects is a new division of Chas. F. Thackray Ltd, the Leeds-based manufacturers and distributors of surgical and medical equipment, which has been formed to meet the growing need for medical centres abroad.

The division offers a total specialist planning and equipping service for operating rooms and related facilities to organisations, companies and government authorities engaged in planning and equipping hospitals, clinics and medical departments outside the UK.

The service includes theatre service units and central sterile supply departments; outpatient, accident and emergency departments; maternity units; milk kitchens; and complete private hospitals and clinics of up to 50 beds. For larger projects Interplan operates in conjunction with major package deal companies or other specialist equipping firms.

The division employs technical consultants, specialist designers and systems and equipment experts. Their main task is to advise clients on the correct selection of equipment and services.

Interplan hospital projects is closely identified at every stage of a building programme, although it does not itself undertake hospital design or construction.

Further information: circle 372

APCL extends service to Iraqi port of Umm Qasr

Arabian Pensinsular Container Line's service from the UK and Europe to the Middle East is being expanded to include the Iraqi port of Umm Qasr. First sailing will be in mid-February by the *Sloman Nereus*, loading at Tilbury and continental ports for Muttrah, Dubai, Dumman, Kuwait, Bahrain and Umm Qasr with transport links to trading centres throughout the region.

Since APCL started operations with two ships last year, the service has grown to a five-ship operation with a 10-day sailing frequency. APCL is jointly operated by PO Strath-Ellerman and the United Arab Shipping Co.

Further information: circle 373

New bonded transit service to Bristol

Emery Air Freight and M. and M. Services, the company's agent in Bristol have introduced a new bonded transit service between Heathrow Airport and Bristol.

It will allow customers in Gloucestershire, Somerset, Avon and Wiltshire areas to have goods cleared through Bristol (Lulsgate) Airport, rather than wait for shipments to pass through the more congested customs sheds in London.

The service will operate daily, with M. and M. Services' own 12-ton box vehicle moving shipments from Emery's bonded facilities at Heathrow to Bristol.

Although it is available to handle all imports passing through Heathrow for Bristol, the new service will be used mainly for shipments from the United States.

Further information: circle 374

BMT offers package for Cairo trade fair

Barry Martin Travel is offering exhibitors a comprehensive 20-night programme which will allow them two free days for preparation prior to the fair's opening on 11 March and a further two days after it closes, 25 March, for clearance of site and customs formalities.

Departure date is 8 March and return date 28 March. Inclusive rates are £390 per person (twin room), or £495 (single).

Minimum six-night tours are available for visitors at any time for the duration of the fair. Inclusive rates per person £290 (twin room), or £325 (single). Additional nights £12.50 and £16 respectively.

Rates for both packages include economy air fares by scheduled services, airport/hotel transfers, daily hotel/exhibition/hotel transfers, service charges and taxes, and BMT on-site representation. Exhibitors and visitors will be accommodated in new, luxuriously furnished apartments, centrally situated in Cairo, with own telephone, plus telex facilities.

Further information: circle 375

Peltours introduces new booklet for business travellers

Peltours has introduced a new guide to eastern Europe, catering exclusively for the business traveller.

The programme offers multi-country tours, combining several stops into one package. Clients are able to select their own hotels, dates of travel, and flights.

There is also a four page information section which has been designed to answer many of the questions raised by clients and to provide details on visa requirements, public holidays, important addresses.

Further information: circle 376

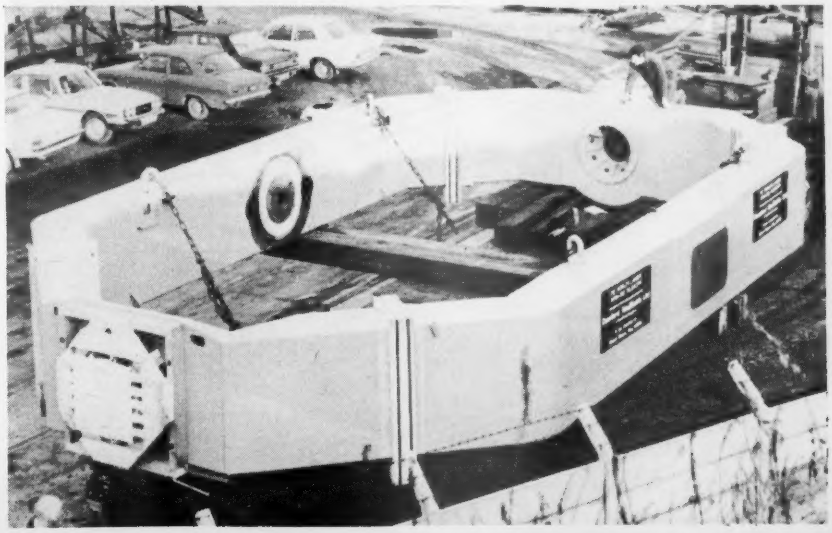
Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Pickfords moves telescope bound for Hawaii

To transport a 27-ton yoke, intended for an infra-red telescope in Hawaii, from Sheffield to Liverpool from where it was being shipped, Pickfords Heavy Haulage Ltd used its Scammell 'Samson' to pull a 50-ton crane trailer on which the yoke was loaded. The yoke measures 11.9 m × 6.4 m × 1.2 m. The 3.8 m telescope for which the yoke is intended was designed and built by the special projects division of Dunford Hadfields Ltd for the Science Research Council.

Further information: circle 377



New container service route to Nigeria

Controlo Cargo Services Ltd, international shipping and forwarding agents based in Aldridge, west Midlands, is now moving containers to Lagos and other interior destinations via Cotonou.

Through freight rates and bills of lading to delivered Lagos domicile are offered with departures every month, the overall transit time from departure UK to arrival at the consignee's warehouse being in the region of 21 to 28 days.

The carrying vessel has a priority berth in Cotonou so there is no delay in discharge; the containers are cleared through Nigerian customs at the Benin border point.

The containers and goods are covered by a 100 per cent liability insurance cover until the cargoes are delivered to final destination. In addition to this container route, CCS Ltd are also offering through transport by trailer via various ro/ro ferry routes. They can also offer a limited amount of space on conventional vessels to Apapa, Warri and Port Harcourt, all of which would avoid the various congestions at these ports; container movements to Port Harcourt are also being effected with discharge at a private berth.

Further information: circle 378

Tri-Wall packs model aircraft

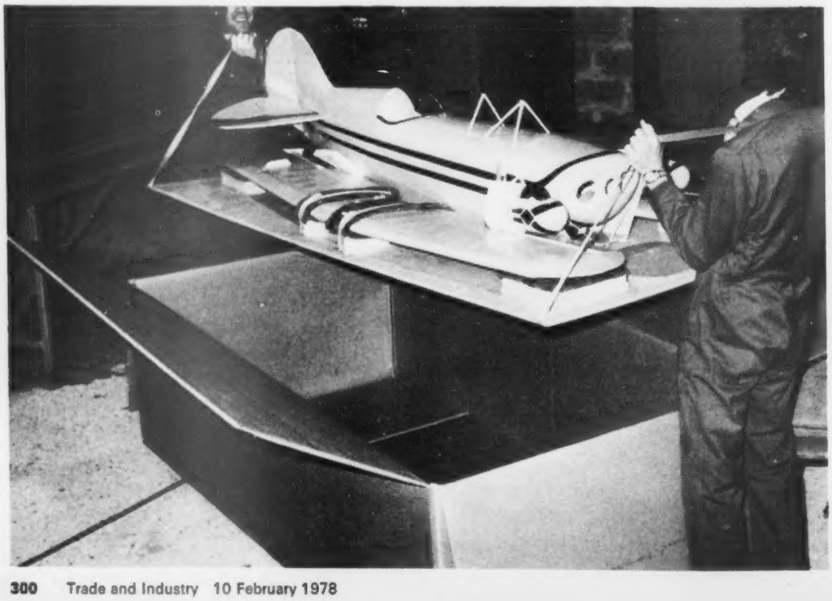
Tri-Wall Pak was used to pack racing driver Emerson Fittipaldi's model aircraft before it was airfreighted from Heathrow to Sao Paulo in South America.

The model is of a Pitts Special Bi-Plane with a 6 ft wing span and 50 cc engine, capable of 100 mph.

At OTP in Reading, manufacturers of Tri-Wall, the model was cushion-strapped to a plywood pallet, and lowered into a Tri-Wall Pak container made to the precise measurements of the aircraft. A Tri-Wall Pak sleeve was inserted to secure the pallet, prior to taping the top flaps. Total weight was 20 lb.

Further information: circle 379

The Fittipaldi aircraft being loaded into the special Tri-Wall Pak container at OTP, near Reading.



Walford opens new office in Nairobi

Walford Maritime, the shipping and transport group, is opening a new office in Nairobi. The new office will handle all Walford services in Kenya.

The group's major subsidiary in Africa is Leopold Walford (Zambia) Ltd and associated companies include Maritime Forwarders (Tanzania) Ltd and Manubito Limitada, Angola. Walford are also liner agents for several African shipping lines including Companhia de Navegacao Angolana Sarl, Companhia Mocambicana de Navegacao and Eel Express Line.

Further information: circle 380

New US – Nigeria shipping service introduced

BFI Line has launched a new ro-ro shipping service from America's east coast direct to Lagos – Apapa, Nigeria. Sailing from Portsmouth, Virginia and Baltimore, Maryland, the service will commence with one vessel but it is intended that this will shortly be supplemented by a second vessel in order to provide a fortnightly service.

The first sailing, which departed during the last week in January, was the German registered *Travetal* with a capacity of 65 trailers. BFI anticipates that the cargo will generally comprise construction and civil engineering equipment, consumer goods and educational equipment.

In America, the service will be handled by Norton Lilly and Co who has recently been appointed as BFI general agents for that country. Norton Lilly is an old, established shipping agency with 26 offices throughout the US and over 450 personnel. Apart from BFI it represents 14 other lines and utilise advanced and comprehensive computerised systems.

Further information: circle 381

DJB Engineering opens American office

DJB Engineering Ltd, Peterlee, have now established a sales office in north America at Suite 224, The American City Building, Wincopin Circle, Columbia, Maryland 21044, USA, tel. (area code) 301 997 7774.

This, the latest development in DJB's exporting programme, has been brought about by the company's successful penetration of the north American market over the last 12 months.

Keith Ashton has been appointed director of north American operations, residing in the United States. It is planned that a number of regional managers for this important market will be appointed shortly.

Further information: circle 382

PO extends International Datel Services

International Datel 2400, the data transmission service by phone introduced by the Post Office five months ago, has been extended to five more countries. The 2400 service is based on a new modem (modulator/demodulator) which enables the Post Office to provide a full international data service at 2400 bit/s over the public telephone network.

International Datel 2400 has been introduced on international direct dialling to Switzerland and France. At the same time the service has become available to Dubai, Hong Kong and the United States through the operator. The United States service is available through all three American record carriers – ITT Communications, RCA Global Communications and Western Union International. Two services are being introduced to Barbados and Bermuda – International Datel 200 and 600. These will be available through the operator.

Modem 12 can also be supplied by the Post Office for connection to international leased private circuits. With four-wire circuits, simultaneous bothway (full duplex) transmission at 2400 bit/s can be achieved with half-duplex public network back-up.

Connection charge for all versions of Modem 12 is £100. Annual rentals for the version supplied for use with International Datel 2400 is £350, with or without the backward channel module. When supplied for connection to private circuits, Modem 12 annual rental is £300. These charges are subject to VAT.

Further information: circle 383

Overseas trade country data

Australia

Ceramic floor and wall tiles. A notice in *Trade and Industry*, 24 June 1977, reported that following the imposition of an additional temporary duty on certain glazed tiles falling within tariff items 69.07 or 69.08 the Industries Assistance Commission (IAC) had been requested to inquire into the long-term assistance needs of the ceramic tile industry. The IAC is now in a position to proceed with its inquiry but it will not announce the date(s) and location(s) until intending witnesses return the questionnaire which was recently issued by the IAC for use in the preparation of evidence. UK firms or trade associations intending to submit evidence at the public hearing should advise The Secretary, Industries Assistance Commission, PO Box J255, Brickfield Hill, NSW 2000, immediately of their intention.

Inquiries: CRE 01-215 5319.

Ref. CRE 865/77

Belgium

Animal feedingstuffs. The *Moniteur Belge*, 11, of 17 January 1978, published a decree dated 21 December 1977 amending the decree of 12 July 1972 concerning the sale of substances destined for use in animal feedingstuffs. Copies of this decree (in French) are available.

Inquiries: OTAR 01-248 5757 ext. 288/466/467.

Ethiopia

Exchange control. The National Bank of Ethiopia has issued a notice to importers (10 January 1978) giving a list of goods for which foreign exchange will not be available. Inquiries should give the CCCN number of the goods concerned.

Inquiries: OTAR 01-248 5757 ext. 472/471/473.

France

Cosmetics. The *Official Journal* of 25 January 1978 carried the texts of two new regulations concerning cosmetics.

Decree 77-1558 of 28 December 1977 sets out the particulars which must appear on the dossier of a product before it can be put on the market and the authorities to whom notice must be given.

An order of 28 December 1977 lays down the warning which must appear on the packaging etc, of cosmetics containing certain poisonous substances listed in the order of 22 March 1977.

Copies of the French text of the two documents can be obtained from OTAR. An English translation is being prepared.

Inquiries: OTAR 01-248 5757 ext. 423.

Federal Republic of Germany

Cosmetics, cheese and milk, medicine and fertilisers. The *Bundesgesetzblatt* of 21 December 1977, 86, published the order on cosmetic substances, 16 December 1977. The order came into force on 1 January 1978.

The *Bundesgestzblatt* of 23 December 1977, 88, published the following:

1 An order dated 20 December 1977 to amend the cheese order of 19 February 1976 and the order on milk products last amended on 10 May 1976. This order came into effect on 1 January 1978.
2 An order dated 20 December 1977 on the marketing of additives and individual additive like foodstuffs.
3 An order dated 20 December 1977 on the admission of additives in foodstuffs. Both orders take effect from 1 January 1978.

The *Bundesgestzblatt* of 24 December 1977, 89, published:

1 The thirty-eighth order (dated 19 December 1977) to amend the decision on the substances and preparations under article 35 of the Medicines and Drugs Act 24 August 1976. This order came into effect on the day of publication.
2 An order on tobacco products dated 20 December 1977. This order came into effect on 1 January 1978.
3 The fifth order (dated 20 December 1977) to amend the dietetic foods order of 24 October 1975. The order came into force on the day of publication.
4 An order dated 20 December 1977 to amend the meat order of 6 June 1973 and the egg products order of 19 February 1975. Certain articles came into force on 1 January 1978 but others come into effect later.
5 An order amending the order on the food law. The current order came into force on 1 January 1978.

The *Bundesgestzblatt* of 28 December 1977, 90, published the following orders on fertilisers:

1 The fertiliser order of 19 December 1977. The order came into effect on 1 January 1978.
2 An order on the procedure for taking tests, and method of analysis for the official supervision of fertilisers dated 19 December 1977. This order came into effect on 1 January 1978.
3 An order dated 19 December 1977 setting up a scientific advisory council for questions on fertilisers. This order came into effect on 1 January 1978.

Copies in German are available.

Inquiries: OTAR 01-248 5757 ext. 467/466/288.

Indonesia

New plant health regulations. The Indonesian Minister of Agrigulture has announced, with effect from 29 July 1977 new regulations for the import of plants and seeds. Loan copy on request from OTAR.

Inquiries: OTAR 01-248 5757 ext. 469/401/468.

CKD level for mini tractors and hand tractors. The Indonesian Director General of the Metal and Machines Industry has announced with effect from 20 December 1977 that for each type of mini tractor or hand tractor imported the 'completely knocked down' component list must be sent to the minister for prior approval. Loan copy of regulations on request from OTAR.

Inquiries: OTAR 01-248 5757 ext. 469/401/468.

Iraq

Allowances. British companies operating in Iraq on contracts awarded by state organisations are advised that they may be required to pay each worker a 'marriage and children's allowance'. There are various rates of allowance but the maximum to be paid in respect of any one worker is ID12 per month.

All inquiries on this notice should be directed to CRE 5, Room 305, 1 Victoria Street.

Inquiries: CRE 01-215 3454.

Ireland

Imports of footwear. As from 1 January 1978, for imports of footwear with outer soles of leather, composition leather, rubber, or artificial plastic material, falling under CCCN 64.02, the rate of import duty on such footwear, originating in the UK and other member states of the EEC will be nil.

The full rate, applicable to imports from third countries, will be 8 per cent.

A European community certificate of origin, issued by authorised chambers of commerce in the UK, should continue to accompany consignments of such goods, together with the appropriate community transit documentation, to establish that the goods do not originate in Czechoslovakia or Taiwan and are not therefore subject to import restriction.

Import authorisations, issued by the Department of Industry, Commerce and Energy in Dublin, will still be required before goods can be cleared through customs.

Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Export (CRE) Division, 1 Victoria Street, London SW1H 0ET (tel: direct dialling); and Overseas Tariffs and Regulations Section (OTAR), Export Data Branch, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU (tel: 01-248 5757). In each case, the relevant information source is indicated at the end of the notice by its initials (OTAR or CRE) and, in the case of OTAR, the telephone extension.

Israel

Standards. The following Israeli standards have been declared official and compliance with them will be compulsory 60 days from 20 December 1977:

IS No. 282 – October 1975 – Wooden matches
IS No. 907 – July 1976 – Gas heaters for home use
IS No. 818 – December 1976 – Cotton nappies.

The Standards Institution of Israel issues an English translation of the standards and copies may be obtained from the British Standards Institution Library, 2 Park Street, London W1, 01-629 9000, telex 266933.

British exporters requiring technical advice are advised to contact Technical Help to Exporters, British Standards Institution, Maylands Avenue, Hemel Hempstead, Herts, HP2 4SQ, 0442 3111, telex 82424.

No further information is available.

Inquiries: OTAR 01-248 5757 ext. 458/461.

Liberalisation. The Israeli authorities have issued the Free Imports Order 1977 which liberalises the import of many goods. The order contains two schedules, the first being items which are subject to import licensing and the second, items which can only be imported provided certain conditions are complied with. Goods which are not covered by these two schedules (ie a wide variety of goods) are allowed to be imported freely.

Inquiries: OTAR 01-248 5757 ext. 458/461.

Malta

Soft drinks regulations, 1978. The *Malta Gazette* of 24 January 1978 contained legal notice, 13, of 1978 which relates to soft drink regulations. These cover, *inter alia*, composition, labelling and the use of caffeine in soft drinks.

The regulations shall come into force on such a date as the Minister of Health and Environment may fix by order published in the gazettes.

British exporters may obtain a copy of the above regulations from OTAR Section.

Inquiries: OTAR 01-248 5757 ext. 458/461.

Morocco

Finance law. It has been announced that in accordance with Finance Law 1978 the special tax on imports has been raised from 8 per cent to 12 per cent.

No further information is available.

Inquiries: OTAR: 01-248 5757 ext. 462.

New Zealand

The economy. On 2 February, Mr Muldoon, the New Zealand Prime Minister and Minister of Finance, announced three measures designed to stimulate the present sluggish New Zealand economy. These were:

1 Relaxation of hire purchase restriction on new and used cars. In future, for new cars, there will be a maximum deposit of 60 per cent with a maximum repayment period of 12 months. Previously new cars could not be bought on hire purchase. For used cars a minimum deposit of 60 per cent is retained but with the repayment period extended from 12 to 18 months.
2 The import deposit scheme introduced in February 1976 is discontinued forthwith although existing deposits will be retained for the full six-month period.
3 Money held on behalf of wool-growers in the wool income deposit scheme introduced in 1976 is to be refunded.

In addition to these measures the 5 per cent cut in personal income tax announced in October 1977 came into effect on 1 February 1978.

Inquiries: CRE 01-215 5321.

Portugal

Import deposit. Portuguese *Diario da Republica* 302 (3rd supplement) of 31 December 1977 published decree-law 556/77 which provides for the discontinuation of the import prior deposit scheme. The law states that in view of other existing restrictive measures it is considered no longer necessary to impose the prior deposit scheme and consequently the scheme will not apply to imports made after 31 December 1977.

The system, announced in *Trade and Industry*, 11 November 1977, whereby all imports subject to import deposit require import licence regardless of the value of the consignment, therefore no longer applies.

Inquiries: OTAR 01-248 5757 ext. 460.

Imports of CKD motor vehicles. The quotas for CKD vehicles in *Trade and Industry*, 27 January, should read, 'fixed in thousands of escudos'.

Seychelles

Import duties. Decree 1 of 1978 amends the Customs Tariff Act as follows:

The import duty on sausages; fish, fresh, salted or frozen and shellfish (class 2); eggs, fresh, dried or preserved (class 4); and ice-cream (class 9), is amended to 50 per cent from any source.

Meat, poultry and fish, preserved in airtight containers (class 2), the duty rate has been amended to 20 per cent from preference countries and to 25 per cent from other countries.

Rates of duty varying from 5 per cent to 30 per cent now apply to pork, pig-meat, bacon, ham, fresh and frozen fruits, nuts, vegetables whether dehydrated, fresh, frozen or preserved in airtight containers and potato crisps.

As a home industry protection measure, the import duty on articles for domestic ornament, fancy goods and imitation jewellery under class 37 have been raised to 100 per cent from any source.

Inquiries: OTAR 01-248 5757 ext. 471/462/472/473.

Singapore

Customs duty amendments. To implement the agreement on the Association of South East Asian Nations preferential trading arrangements (PTA), the Singapore government has issued the customs duties order 1977, which came into effect on 1 January 1978. The member governments of the Asean agreement are: Singapore, Indonesia, Malaysia, Philippines and Thailand. Under this new customs duties order, preferential rates of duty will only be granted on certain goods originating from the Association of South East Asian Nations countries. The goods concerned are mainly garments, for example sorong, batek, shirts, under and outer garments, handkerchiefs of cotton and brassieres. Other goods include those made of leather, composition leather or textiles such as handbags, wallets and briefcases.

This order completely revokes Customs Duties Order 1974 thereby ending all preferential rates of duty on UK goods exported to Singapore. The descriptions and subheadings of certain tariff items have also been amended and are now given in greater detail.

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

South Africa

Customs tariff application. Customs tariff application list 3/78, published in the South African *Government Gazette* of 3 February 1978, contains applications to the Board of Trade and Industries for increase in duty on the following:

1 Floor coverings (including tiles), of vinyl chloride polymers of copolymers, not backed with asbestos, classifiable under tariff subheadings 39.02.51.20 and 39.07.80.20
2 Plates, sheets, strip, film and foil of vinyl chloride polymers or copolymers of a thickness exceeding 0.035 mm but not exceeding 0.05 mm (excluding opaque plates, sheets, strip, film and foil), classifiable under tariff subheading 39.02.54.10.
3 Sparking plugs (excluding parts), classifiable under tariff subheadings 85.08.10.10 and 85.08.10.90, including those imported with unassembled motor vehicles, classifiable under tariff subheadings 87.01.60, 87.02.15, 87.02.22, 87.02.24, 87.02.60 and 87.02.70, and with unassembled chassis, classifiable under tariff subheadings 87.04.20 and 87.04.25.

Those British trade organisations thought to be interested in the application are being informed. Any British firm affected which wishes to make representations to the South African Board of Trade and Industries and belongs to a trade organisation should, therefore, first contact its own trade association.

Inquiries: CRE 01-215 5274.

Electrical equipment. Regulation R 101 published in the *Government Gazette* of 13 January 1978 gives notice that the Minister of Economic Affairs intends to withdraw schedule 10 of the compulsory standard specifications for certain items of electrical equipment. The purport of this step is to bring the requirements for appliance couplers for domestic appliances into line with technological developments in this field.

Inquiries: CRE 01-215 5276.

Import control. Under R2600 in South African *Government Gazette* 5836, of 30 December 1977, the following goods have been removed from the restricted list, category 4:

Woven fabrics and worsted fabrics; milling cutters (CCCN 82.05); air-conditioning machines (CCCN 84.12);

ice-cube making equipment (CCCN 84.15); and television apparatus and equipment (CCCN 85.15).

The following items were added to the restricted list:

Dolphins (CCCN 01.06) and propellent powders (CCCN 36.01).

Inquiries: OTAR 01-248 5757 ext. 471/462/472/473.

Customs tariff changes. The following amendments were published in the South African *Government Gazette* of 13 January1978.

R.93 CCCN 29.14: The effect of this amendment is that the rate of duty on vinyl acetate monomer is increased from 10 per cent or 1500c per 100 kg less 80 per cent to 20 per cent or 45c per kg less 80 per cent.

R.94 CCCN 56.01, 56.02, 56.03 and 56.04: The effect of these amendments is that the rate of duty on (a) polyester fibres (discontinuous), not carded, combed or otherwise prepared for spinning and on polyester fibres (discontinuous or waste), carded, combed or otherwise prepared for spinning is amended to 20 per cent or 125c per kg less 80 per cent, (b) continuous filament tow of polyester fibres for the manufacture of man-made fibres (discontinuous) is amended to 20 per cent or 125c per kg, and (c) waste of polyester fibres (continuous or discontinuous) not carded, combed or otherwise prepared for spinning, is amended to 20 per cent.

Industrial rebates

R.96 The provision for rebate has been amended to full duty on 307.08 (53.11 and 58.05), 308.02 (54.03 and 56.07), 310.08 (54.03 and 58.05), 311.03 (53.06 and 54.03), 311.04 (53.06), 311.05 (54.03), 311.22 (59.11), 312.01 (54.03, 58.05, 59.11 and 59.12), 312.02 (50.09, 53.11, 58.05, 58.07, 59.07 and 59.11), 313.01 (59.12), 315.08 (82.04), 316.01 (84.63, 85.01 and 85.23), 316.02 (84.10 and 85.01), 316.04 (50.09, 85.19 (1) and 85.21), 316.05 (85.03 (2)), 316.10 (85.00 paras. 3, 4, 5 and 6), 316.11 (59.11), 316.13 (85.23), 317.02 (51.04, 55.09 amd 58.04), 317.06 (84.62), 317.08, 318.02 (85.01, 85.14 and 85.19). The extent of the rebate on 320.02 (56.07) has been amended to full duty less the greater of 10 per cent or 14.4c per m^2.

R.97 316.14 (48.15): The effect of this notice is that the provision for a rebate of duty on kraft tissue paper for the manufacture of electrical capacitors is extended with retrospective effect to 27 June 1975 to cover all paper falling within tariff heading no. 48.15.

R.95 CCCN 70.10, 70.14 and 70.17. The rate of duty on cylindrical glass bottles, phials and vials and other tubular containers, of a capacity not exceeding 35 ml, on certain lamp-chimneys for oil-lamps and glass ampoules is increased to 25 per cent whilst the rate of duty on certain lamp-chimneys for gas lamps is increased to 15 per cent.

The following amendments were published in the South African *Government Gazette* of 20 January 1978.

R.125 CCCN 73.14 and 73.15: The rate of duty on certain wire of iron or steel, plated, or clad with copper, is increased.

Industrial rebates

R.126 311.19 (56.07): The provision for a rebate of duty on certain woven unprinted fabrics of synthetic fibres (discontinuous or waste), of a value for duty purposes per m^2 exceeding 62c and of a mass per m^2 of 142 g or more but less than 250 g, for the manufacture of boys' shorts, is withdrawn because the rebate has expired.

Inquiries: OTAR 01-248 5757 ext. 471/462/472/473.

Import permits. The Minister of Economic Affairs has announced an import permit allocation for 1978 equivalent to 40 per cent of the total permits issued in 1977 in respect of the following products:

consumer goods; clothing; confectionery; and beverages (including whisky).

In May the minister is expected to give consideration to a possible further permit allocation.

Inquiries: OTAR 01-248 5757 ext. 471/472/473/462.

Sweden

Surveillance licensing for steel imports. The Swedish government has announced that it will introduce a system of surveillance licensing for steel imports with effect from 15 February 1978. Licences will be issued when the necessary information on quantity, source and price has been provided to the Swedish Board of Commerce. No further information is yet available.

Inquiries: OTAR 01-248 5757 ext. 459.

Thailand

Fabrics and yarns. On 15 January 1977 the Thai Board of Investment issued notice, 1/2520 whereby a special fee of 20 per cent was placed on the import of woven fabrics and yarns.

The Thai Board of Investment has now issued notice, 36/2520 whereby this special fee of 20 per cent is to remain in force until 31 December 1978.

The fabrics and yarns concerned are as follows:

Woven fabrics

1 Woven fabrics of cotton CCCN 55.07a; 55.08a; 55.09b; 60.01a; and 62.02 (only bath towels and handkerchiefs made of terry).
2 Woven fabrics of man-made fibres, namely polyester, nylon 6, viscose rayon, acrylic and polyester mixed with viscose rayon, CCCN 51.04; 56.07; 60.01b; and 62.02 (only bath towels and handkerchiefs made of terry).
3 Woven fabrics made of polyester fibre mixed with cotton. CCCN 51.04; 55.09c; 56.07; 60.01a; and 62.02 (only bath towels and handkerchiefs made of terry).

2. Yarns

1 Cotton yarns CCCN 55.05; 55.06.
2 Man-made fibres, namely polyester, nylon 6, viscose rayon, acrylic and polyester mixed with viscose rayon or cotton. CCCN 56.05; 56.06.

As before, the Board of Investment shall determine which imports fall into this category.

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

It also issued notice, 2/2520, whereby a special fee of 30 per cent was placed on the import of certain fibres and yarns.

The Thai Board of Investment has now issued notice, 37/2520, whereby this special fee of 30 per cent is to remain in force until 31 December 1978.

The fibres and yarns concerned are as follows:

1 Discontinuous polyester fibre CCCN 56.01.
2 Continuous polyester filament yarn, continuous nylon filament yarn, and nylon stretched yarn. CCCN 51.01; 51.03.

As before, the Board of Investment shall determine which imports fall into this category.

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

Trinidad and Tobago

Salad dressing. The Trinidad and Tobago authorities have announced that import licences are now required for the following goods:

Tariff no.	Description of item
21.04	Mayonnaise and salad dressing, however described

Inquiries: OTAR 01-248 5757 ext. 7312/456/457.

Tunisia

Production tax. The *Tunisian Journal* of 31 December 1977 announced a reduction to 10 per cent, with effect from 1 January 1978, on the following items:

ex 84.21	Mechanical appliances (whether or not hand operated) for projecting dispersing or spraying liquids or powders.
ex 84.24	Agricultural and horticultural machinery for soil preparation or cultivation (for example, ploughs, harrows, cultivators, seed and fertiliser distributors);

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CRE	Commercial Relations and Exports Divisions Department of Trade 1 Victoria Street, London SW1H 0ET Tel. Direct dialling (see end of each notice)
OTAR	Overseas Tariffs and Regulations Section Export Data Branch Export Services and Promotions Division Department of Trade Export House, 50 Ludgate Hill, London EC4M 7HU Tel. 01-248 5757 (extension at end of each notice)

ex 84.25	Harvesting and threshing machinery; straw and fodder presses: hay or grass mowers; winnowing and similar cleaning machines for seed, grain or leguminous vegetables and egg-grading and other grading machines for agricultural produce (other than those of a kind used in the bread grain milling industry falling within heading no. 84.29): A. Winnowers and similar machines; egg-grading and other grading machines. B. Other (excluding motor mowers).
84.26	Dairy machinery (including milking machines).
84.27	Presses, crushers and other machinery, of a kind used in wine-making, cider-making; fruit juice preparation or the like.
84.28	Other agricultural, horticultural, poultry-keeping and bee-keeping machinery; germination plant fitted with mechanical or thermal equipment; poultry incubators and brooders.
ex 87.01	Tractors (other than those falling within heading no. 87.07), whether or not fitted with power take-offs, winches or pulleys: Agricultural tractors.

No further information is available.
Inquiries: OTAR 01-248 5757 ext. 462.

United States

Motor vehicle standard 115. The *Federal Register* dated 16 January 1978 published a rule proposed by the National Highway Traffic Safety Administration to amend standard 115 dealing with vehicle identification numbers. Written comments (10 copies) by 17 April 1978 to NHTSA, Room 5108, Nassif Building, 400 Seventh Street SW, Washington DC. 20590.

A copy of the text is available.
Inquiries: 01-248 5757 ext. 456/457/7312.

Miniature Christmas tree lights. The *Federal Register*, dated 16 January 1978, published a notice by the Consumer Product Safety Commission extending the time for establishing a proposed standard for miniature Christmas tree lights. The deadline for publishing a proposed standard is extended to 3 April 1978.

A copy of the text is available.
Inquiries: OTAR 01-248 5757 ext. 456/457/7312.

Alcoholic beverages. The *Federal Register* 16 January 1978, published a notice by the Bureau of Alcohol, Tobacco and Firearms to decide whether the current regulations should be amended to require a warning label on alcoholic beverage containers regarding the consumption of alcohol by pregnant women. Written comments (two copies) by 17 March 1978 to Bureau of Alcohol, Tobacco and Firearms, Regulations and Procedures Division, Washington DC. 20226.

A copy of the text is available.
Inquiries: OTAR 01-248 5757 ext. 456/457/7312.

Import of speciality steels under quota. Import statistics in pounds weight for the following products with quotas still open as at 27 January 1978.

Sheets and strips of stainless steel (item 923.20)	29 019 646
Plates of stainless steel (item 923.21)	4 387 768
Bars of stainless steel (item 923.22)	5 101 020

Inquiries: CRE 01-215 5629

Food additives. The *Federal Register* dated 20 January 1978, published details of final regulations by the Food and Drug Administration relating to various food additives, ie emulsifiers, defoaming agents, and some packaging materials. A copy of the text is available.

Inquiries: OTAR 01-248 5757 ext. 456/457/7312.

Uruguay

Reduction basic rate of value added tax. By decree 709/977 of 21 December 1977, the Uruguyan government reduced the basic rate of value added tax to 18 per cent from 20 per cent, with effect from 1 January 1978.

Inquiries: OTAR 01-248 5757 ext. 474/476.

Yugoslavia

Non-ferrous metal industry. An English translation of a plan for the development of the above industry during the period 1976-80 has been received in Export Services Division. Copies of the plan are available for inspection in the Statistics and Market Intelligence Library, Room D19, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757 ext. 368(9), for a period of two weeks and will thereafter be made available for loan. Applications will be dealt with in strict order of receipt.

Zambia

Budget. The Minister of Finance presented his budget to parliament on 27 January 1978, and announced the following measures (amongst others):

Further restrictions on remittances by individuals and foreign owned companies.
Excise duty increase on a number of commodities, including petrol, drinks and tobacco.
Customs duty increase on selected capital goods from 5 to 7½ per cent.
Increase in selective employment tax on expatriates from 15 to 20 per cent.
Introduction of a new sales tax on cement and telephone charges.

Inquiries: CRE 01-215 5794.

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HMSO BOOKS

European community news

EEC-China trade agreement initialled

On 3 February a non-preferential trade agreement between the EEC and the People's Republic of China was initialled in Brussels.

Provisions of this five-year agreement, the first between the community and a state-trading country, is intended to facilitate the growth of trade between China and the community by creating a favourable formal structure for trade.

The provisions of the agreement include a most-favoured-nation clause; an agreement to try to promote a balanced level of trade; agreement by China to give favourable consideration to imports from the community and by the community to make efforts to liberalise imports from China; safeguard and price clauses; agreement to facilitate commercial visits and trade promotions; and the establishment of a joint committee to meet alternately in Peking and in Brussels from time to time.

UK to maintain existing fish conservation measures – Silkin

Little progress was made and no major issues were resolved in discussions on an internal fishing regime for the community, said John Silkin, Minister of Agriculture, Fisheries and Food on 1 February. He was reporting to the House of Commons on the meeting of EEC agriculture, and fisheries ministers held in Brussels on 30 and 31 January.

He said it was clear early in the meeting that agreement on a definitive common fisheries policy would not be possible and accordingly attention was focussed on the arrangements to apply in the meantime.

Ministers were unable to agree to a UK proposal that existing standstill arrangements should continue for a further short period. 'For my part I could not agree to an alternative proposal to adopt, on a provisional basis, the commission's latest proposals on quotas, conservation and enforcement which would have left aside the basic issue of coastal preference and other important issues. I maintained the government's position that elements of the common fisheries policy need to be considered as a whole and not adopted piecemeal,' he said.

Mr Silkin explained that in the absence of agreement, the community's so-called standstill arrangement had lapsed at midnight on 31 January. Other member states had declared their intention to observe for the time being, the commission's proposals on quotas and conservation.

'I made clear,' Mr Silkin said, 'the government's intention to take action in accordance with agreed procedures to maintain existing conservation measures; our right to take further appropriate unilateral conservation measures is, of course, unimpaired. I also made clear the government's intention to continue to work for a settlement which would meet the UK's essential requirements.'

Mr Silkin said that agreement had been reached authorising the commission to continue negotiations with third countries on fishing opportunities for 1978.

He also said that at a special meeting of the agriculture council on 31 January the German delegation confirmed that they did not wish to make a link between the devaluation of the green pound and the fisheries negotiations. However the German, Netherlands and Belgian delegations explained that they saw some connection between the devaluation and the negotiations on common price levels for 1978-79. 'I explained the UK additude to the negotiations on farm prices.'

It was eventually agreed that the green pound should be devalued by 7½ per cent, according to the following timetable. For beef and pig-meat, a devaluation of 5 per cent on 2 February; the additional 2½ per cent for these commodities, and 7½ per cent for milk and milk products, to take effect when the council's decision on prices and other measures for 1978-79 enters into effect; for all other commodities, the full 7½ per cent to take effect at the beginning of the marketing year for each commodity.

'I regard this as a very satisfactory outcome. It implements the decision of this house to seek a devaluation of 7½ per cent. It gives substantial immediate help to the pig and beef sectors, which need it. And it defers the adverse effects on consumers of a devaluation for as long as possible: I estimate that the saving to British consumers as a result of the council decision by comparison with an immediate across-the-board devaluation, amounts to some £50 million over the next six months – or about £3 on average for every family,' Mr Silkin said.

More community news

Information on European community matters and about member states can often be found in other sections of *Trade and Industry*. For this week's additional news, turn to the following pages:

Parliament

European policy on steel 278
Price increases abroad 279
Multifibre arrangement negotiations 279
EEC-Japan trade negotiations 280
Code of conduct for firms in South Africa 283

Overseas trade news

British participation at fashion shows 286
THE seminar on construction in W. Germany 287
NTI 1660: Validity of import licences granted under transitional measures 289
NTI 1661: Taiwan-UK residual textile quotas 289

Country data

Belgium 301, France 301, Federal Republic of Germany 301, Ireland 301

Statistics

Changes in the external trade statistics for 1978 312

No EP powers extension without act of parliament

No treaty extending the powers of the European assembly could be ratified by the UK unless it had been first approved by an Act of Parliament. This would be the effect of a new clause in the European Assembly Election Bill moved by David Owen, Secretary of State for Foreign and Commonwealth Affairs, on 1 February.

He said the new clause fulfilled an undertaking given earlier relating to the parliamentary approval of treaties increasing the powers of the assembly.

Dr Owen said that many members of parliament believed that direct elections meant movement towards federalism and that the powers of the commons would be eroded through an extension of those of the assembly without there being adequate consideration of the issues in parliament.

Stressing that the government had never accepted that the community should develop into a federation, Dr Owen said it was determined to uphold the rights of national government and parliament.

He said the reality of parliamentary control already existed beneath the royal prerogative but its lack of visibility was a definite drawback. The government had decided that in this sensitive area it was necessary and right to modify the constitutional procedures.

He said the government was proposing in the new clause that there should be a statutory fetter on the royal prerogative to negotiate and ratify treaties. The new clause would prohibit the ratification of any treaty (including any international agreement, and any protocol or annexe to a treaty or international agreement) extending the powers of the assembly without prior parliamentary approval, he concluded.

Commission's data-processing projects

Invitations to tender for two joint data-processing projects will be issued by the European commission in May.

The first consists of a number of projects in the software 'portability' field – methods of using the same software on computers of differing make. Three sub-projects are involved: one is a study of a software writing language; the second is a study on conversion tools; and the third a study on the feasibility of developing a common software interface for minicomputers.

The second major project covers an in-depth study aimed at determining long-term requirements for a community framework enabling the member states and the commission to develop and link up, to their mutual advantage, informatic systems for the processing of data of import/exports and on the management and financial control of agricultural market organisations.

Two preliminary surveys conducted for the commission confirmed the urgent need for a community framework for the development of informatic systems for imports and exports and these reports indicated in some detail how to develop this framework as well as a number of short and medium-term improvements which should be made.

The commission has decided that the short and medium-term steps will be implemented where necessary. But to meet the longer-term needs it will be necessary to carry out a detailed study of the major requirements of the member states and the commission.

Technical details of both projects were published in the *Official Journal* C19, 24 January.

Firms who would like further information are asked to write to The Commission of the European Communities, 200 Rue de la Loi, RP 6/1/11, B-1049, Brussels, marking the envelope 'attention of the office No RP 6-1/11'.

Proposals for certain 1979 EEC tariff quotas

The Department of Trade has been asked by the EEC commission to provide by the beginning of March statistical data in order to enable it to make proposals for renewing for 1979 annual community 'global' tariff quotas. These are full or partial suspensions of duties on a specified quantity (or 'quota') of imports from all sources outside the EEC. The information needed is for past 1977 UK imports and exports and expected 1979 domestic consumption and production. This information is being sought by departments from industry where it is not available from official statistics.

A list of 'global' tariff quotas expected to be opened in 1979 is set out below, showing the categories into which they fall. These are:

1 tariff quotas the EEC is bound to open to satisfy obligations made under the Gatt;
2 tariff quotas provided for under protocols to the act of accession; and
3 'autonomous' tariff quotas; ie those which, although the EEC has no international obligations, member states may unanimously agree among themselves to establish.

The list shows in the case of the Gatt quotas the annual quantity of imports into the community as a whole that the EEC is bound to admit duty free. For the Gatt quotas the unanimous agreement of member states (as in the case of autonomous quotas) is required for any increase above the minimum prescribed. The allocation of any quota among member states is also a matter to be settled between them.

UK producers may either object to the renewal of the 'autonomous' tariff quotas or suggest upper limits, if they consider that they could themselves supply the whole or the greater part of the community import requirements. Any producer wishing to object should provide as much as possible of the following information to the address below by 27 February at the latest:

1 estimated community demand in 1979
2 estimated UK demand in 1979
3 UK production expected to be available for
  3.1 the UK market in 1979
  3.2 the rest of the community in 1979
  3.3 export to other countries for 1979

Other 'global' tariff quotas expected to be opened in 1979 include, magnesium, rosins, alpine cattle and dried grapes. In addition should any user or producer of any goods specified in this notice consider that he has information that may be relevant he should send it as soon as possible to Department of Trade, General Division, Room 333, Kingsgate House, 66-74 Victoria Street, London SW1E 6SJ.

Community tariff quotas expected to be opened for exports from all third countries in 1979

Tariff heading	Item	Community's obligation under Gatt	Protocol to the Act of Accession	Autonomous
02.01 AIIb)	Frozen beef	38 500 tonnes at 20 per cent rate of duty	—	—
03.01 AII	Certain fresh eels for processing	—	—	Autonomous
ex 44.15 A	Certain plywood of coniferous species	400 000 m³ duty-free annually	Protocol 11 provides for nil-duty quotas to be opened, the volume to be decided annually when it is established that all possibilities of supply on the internal market of the community will be exhausted for that year	Anything above 400 000 m³
48.01 A ex 48.01 F	Newsprint	1.5 million tonnes duty-free annually	Protocol 13 provides for an autonomous nil-duty quota to be opened annually for 48.01 A, when it has been established that all possibilities of supply on the internal market of the community will be exhausted for that year	Anything above 1.5 million tonnes
50.02 [1]	Raw silk	—	—	Autonomous
50.04 [1]	Yarn wholly of silk	—	—	Autonomous
50.05 [1]	Yarn wholly of silk waste other than noil	—	—	Autonomous
73.02 C	Ferro-silicon	20 000 tonnes duty-free annually	—	—
73.02 D	Ferro-silico manganese	50 000 tonnes duty-free annually	—	—
ex 73.02 EI	Ferro-chromium containing not more than 0.1 per cent by weight of carbon and more than 30 per cent but not more than 90 per cent of chromium	3 000 tonnes duty-free annually	—	—

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[1] The EEC had agreed to have the tariff quotas only till the end of 1976, they were extended for 1977 and 1978, but it is not certain whether they will continue in 1979.

Proposals on materials in contact with food issued

Proposals for regulations have been issued concerning materials and articles intended to come into contact with food.

The regulations, which would implement the UK's obligations under EEC directive 768/93, are designed to establish a framework of protection for consumers by limiting trade in, and the use of, materials and articles intended to come into contact with food to those which meet certain criteria. These criteria would require that if materials and articles transfer any of their constituents to the food which they come into contact with at any stage of its production, preparation or distribution, they must not do so in such a way as to make the food harmful to the health of, or make it otherwise unacceptable to, the consumer.

The regulations would also require materials and articles which were intended for, but were not at the time in contact with, food to be labelled, or otherwise identified, with information of value to the consumer including, where appropriate, any special instructions as to their use.

Copies of the proposals may be obtained from Mrs J. M. Nash, Food Additives and Contaminants Division, Ministry of Agriculture, Fisheries and Food, Room 555, Great Westminster House, Horseferry Road, London SW1P 2AE, tel. 01-216 6050. Comments on the proposals should be sent not later than 31 March.

The regulations will apply to all materials and articles intended to come into contact with food. These general controls are likely to be followed, in due course, by more detailed controls applying to particular groups of materials or articles or their constituents. These specific controls will be the subject of separate proposals.

EEC – your questions answered

This week, we are publishing a selection of questions put to the Department of Industry's EEC Information Unit during the past month.

The unit helps businessmen by answering general questions about EEC membership. Its prime responsibility is with those matters which are the concern of the Departments of Industry, Trade, Prices and Consumer Protection, but it is usually possible to direct an inquirer to sources of specialist advice in other government departments.

Contact the unit by ringing 01-215 4301 (six lines) or by writing to the EEC Information Unit, Department of Industry, 1 Victoria Street, London SW1H 0ET.

Labelling regulations

I am a manufacturer of toxic substances supplying customers both at home and abroad and I understand that new EEC regulations apply to the packaging and labelling of such substances. Where can I find details?

Regulations in the form of a statutory instrument are about to be issued which implement in Great Britain the provisions of directive 67/548/EEC on the classification, packaging and labelling of dangerous substances. The regulations take into account all amendments to the directive up to and including the fifth.

The regulations will apply to some 800 prescribed dangerous substances commonly used in industry, many of which are classified as toxic. This is the first step towards producing a standardised scheme, under the EEC, for the labelling of all hazardous substances. A directive dealing with paints, varnishes, adhesives and printing inks has recently been approved and member states have two years in which to introduce implementing legislation. Work is also in progress on pesticides, solvents and a wide range of household products some of which can be dangerous in the home if not properly used.

It will be the responsibility of suppliers to package and label hazardous substances in accordance with the regulations. Manufacturers or importers will be required to attach labels before supplying directly to other manufacturers or before supplying wholesale or retail outlets. Wholesalers and retailers will still have an obligation to ensure that products are correctly labelled before supplying them to users; in practice it is expected that the manufacturer's label will remain on the container.

Chemicals covered by the regulations are classified according to the hazards they represent. The classifications used are – explosive, highly flammable, toxic, corrosive, flammable, oxidising, irritant and harmful.

The main feature of the label is a danger symbol accompanied by a key word. Each symbol shows, where possible, the likely dangers and will be printed in black on a bright orange/yellow background. Each classification has its own symbol and in the case of toxics this will be a skull and crossbones.

In addition labels will carry the name of the chemical, the name and address of the supplier or manufacturer and risk and safety phrases spelling out in more detail the main dangers and giving advice on sensible safety precautions.

Containers of some dangerous chemicals have to be labelled for international and domestic transport. For these chemicals a composite label is allowed so that a container need carry only one label.

As far as packaging is concerned the regulations include requirements that the packaging must be designed, constructed and secured to prevent accidental spillage in the normal course of handling.

The regulations will be implemented in two stages according to container size and will come into effect six months after they are made for large containers with a capacity of 200 litres or more, and 12 months after for containers of a capacity of less than 200 litres.

Substances supplied for export are exempted from the regulations but exporters should consult Overseas Tariffs and Regulations Section (OTAR), Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757. In the case of EEC countries requirements should be much in line with UK regulations.

For further information regarding the packaging and labelling of dangerous substances contact Hazardous Substances Division, Health and Safety Executive, Baynards House, 1 Chepstow Place, London W2 4TF, tel. 01-229 3456 ext. 666/608.

Social Fund help

What type of financial assistance is available from the European Social Fund or under the EEC anti-poverty programme?

Established under the treaty of Rome to provide assistance for occupational training and resettlement schemes throughout the community, the European Social Fund has since expanded in scope. The fund originally provided simple reimbursement to member states of 50 per cent of the cost of government training and resettlement schemes for the unemployed. Since May 1972 workers facing redundancy, as well as the unemployed, have been able to benefit from the fund and priority has been given to schemes helping problem regions and industries and certain categories of individuals such as young people.

The two types of assistance currently provided by the fund are:

Article 4 assistance. This is available for specific industries and groups which are directly affected by community policies and which are the subject of specific council decisions. This assistance originally covered schemes for workers in or leaving the textile industry and workers leaving agriculture but now extends to schemes for the integration into the social and working environment of migrant workers and specific operations to facilitate the employment and mobility of young people under 25 years old seeking their first employment. Assistance is also available with effect from January 1978 for operations to encourage the employment of women over 25 years of age with little or no vocational qualifications who are having difficulty in entering or re-entering working life.

Article 5 assistance. This is available for schemes which relate either to the training or resettlement of unemployed people in areas where there is serious and prolonged imbalance in labour supply and demand or to the retraining of people to meet the demands of technical progress in certain branches of the economy or to the rehabilitation of disabled people.

The fund can provide up to 50 per cent of the cost of schemes which must be wholly or partly financed from public funds. Assistance can be granted for operations run by private bodies only if assistance is also forthcoming from UK public funds, whether from central government, local authority or another public body, eg an industrial training board.

Applications to the fund should be made through the Department of Employment and must be submitted to the EEC commission at least three months before the period to which they relate. Allocations against applications are made by the commission on the advice of the social fund advisory committee which comprises representatives of governments, employers' federations and trades unions from each of the member states.

In 1977 the council made available almost £114 million for expenditure under article 4 and almost £143 million under article 5. For 1976, the comparable figures were about £71 million and just over £112 million.

The social fund budget is not nearly big enough to meet all valid applications and the advisory committee gives highest priority to those schemes relating to geographical areas or aspects of the training or employment situation that it considers most in need of assistance from the fund. Payments from the fund are made retrospectively on the basis of proven expenditure.

Inquiries about the fund and possible applications should be addressed to the Department of Employment (Overseas Division), 32 St James's Square, London SW1Y 4JR.

The EEC anti-poverty programme was established by a decision of the council of ministers in June 1975, as part of the community's social action programme. In this country, the projects are funded jointly by the commission and the UK government and are administered by the Department of Health and Social Security.

The UK has several projects which come under the programme and details were published by the commission in 1975. The programme was initially for two years and came to an end in November 1977 but has been extended by the council of ministers until 1980. The projects include aid for voluntary organisations providing family day-centre facilities to assist the poorest families in self-help activities; community resource centres to provide technical aid, information and support for local groups; a project to provide advice and lay representation before tribunals and aid for two surveys, one of areas of special need (recently completed) and the other of the work of voluntary organisations.

There is at present no provision which enables projects to be submitted on a continuing basis and therefore it is not possible to consider further bids in addition to those which have already been received and on which decisions have already been taken.

EEC commissioners

What are the names and functions of the members of the European commission and how are they appointed?

The names of the members of the commission and their respective functions are as follows:

President	
Roy Jenkins (British)	Secretariat-General Legal service Information Spokesman's group Security office
Vice-Presidents	
Francois-Xavier Ortoli (French)	Economic and financial affairs Credit and investments Statistical office
Wilhelm Haferkamp (German)	External relations
Finn Olav Gundelach (Danish)	Agriculture and fisheries
Lorenzo Natali (Italian)	Enlargement Protection of the environment Nuclear safety Contacts with member governments and public opinion on preparation for direct elections to the European parliament
Henk Vredeling (Dutch)	Employment and social affairs Tripartite conference
Commissioners	
Claude Cheysson (French)	Development
Guido Brunner (German)	Energy Research, science and education Euratom Supply Agency Scientific and technical information and information management Joint Research Centre
Raymond Vouel (Luxembourg)	Competition
Antonio Giolitti (Italian)	Co-ordination of community funds Regional policy
Richard Burke (Irish)	Taxation Consumer affairs Transport Relations with the European parliament
Viscount Etienne Davignon (Belgian)	Internal market, and industrial affairs
Christopher Tugendhat (British)	Budget and financial control Financial institutions Personnel and administration

The 13 members – two each from the United Kingdom, France, West Germany and Italy, and one each from Belgium, Denmark, the Irish Republic, Luxembourg and the Netherlands – are appointed by agreement among the Nine for four-year renewable terms. The President and the five Vice-Presidents are appointed from the members for renewable two-year terms. Members do not represent their governments and should act independently of national or other sectional interests.

The members meet once a week, usually in Brussels, but if necessary where the European parliament is meeting. One of their most important functions is to formulate proposals on which the council of ministers will decide. Although each member is responsible for one or more of the main community activities, they act as a collegiate body with collective responsibility for all the actions of the commission. Their decisions are reached on the basis of simple majority voting.

The members are supported by an administrative staff numbering some 5000 people, organised in 19 directorates-general (number 11 superseded) each responsible for a particular field of community policy.

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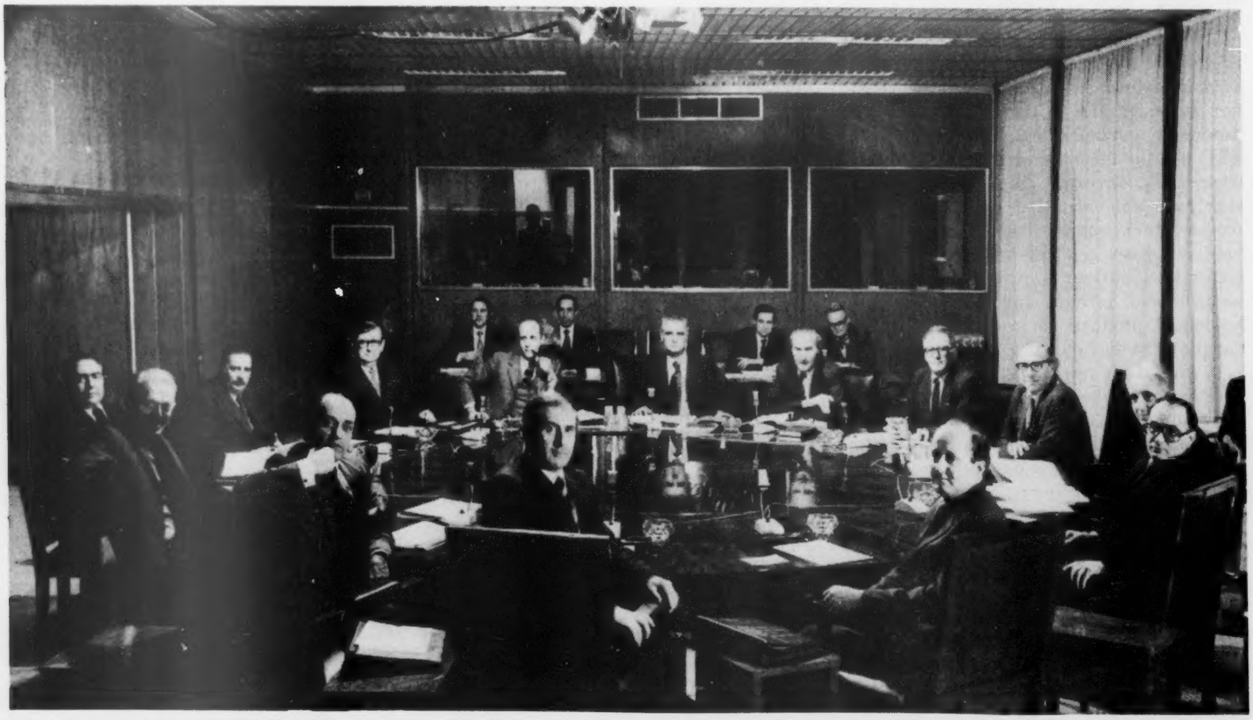
Trade and Industry

The commission in session. The two UK commissioners are Roy Jenkins, president (third from right) and Christopher Tugendhat, budgetary commissioner (right foreground, closest to camera).



Tobacco taxes: health and harmonisation

Harmonisation of tobacco taxes between EEC member states has been progressing since 1972 when the first directive was adopted. Last December the fifth directive was adopted which lays down the rules for the second stage of harmonisation to run from 1 July 1978 to 31 December 1980. Margaret Wilkinson of Customs and Excise gives the background to this harmonisation and how the latest stage copes with the UK's stand on cigarette health hazards.

On 19 December 1977 the EEC council of ministers adopted the fifth directive on tobacco taxation. The directive lays down the rules for the second stage of cigarette duty harmonisation, which is to run from 1 July 1978 to 31 December 1980. There is an important derogation for the UK allowing Britain to depart from the general rule that all cigarettes must be subject to the same rates of duty within each member state. The UK sought this derogation because of its concern over the health risks of smoking cigarettes with high yields of tar and its successful negotiation means that during the two-and-a-half-year period of the second stage it will be possible to impose a supplementary duty on cigarettes with a tar yield of 20 mg or more.

First moves

The first moves towards the harmonisation of tobacco taxation were made before the UK's accession to the community. A first directive, adopted in December 1972, required excise duty to be imposed on end products and, in the case of cigarettes, to consist of a 'proportional' (ie *ad valorem*) element based on the retail price and a 'specific' element per cigarette. The directive said the specific element in the duty during the first stage should represent not less than 5 per cent and not more than 75 per cent of the sum of the two elements in relation to the most popular price class of cigarettes. It was the intention that the upper and lower limits for the specific element should be drawn together in later stages until there was a single fixed relationship between the two elements in the duty operating throughout the community.

Progress

Progress towards this objective has been slow because of the important commercial and social implications for member states when changes have to be made in their duty structure. The first stage was originally due to end on 30 June 1975, but it has been extended by later directives and will now end on 30 June 1978. Agreement has been reached with the adoption of the fifth directive on the narrowing of the limits for the specific element in the second stage. It has been decided that these percentages should, in future, relate to total taxation, including VAT, instead of to excise duty alone; from 1 July, the specific element must fall between 5 per cent and 55 per cent of total taxation.

General structure

The general EEC structure of the duty on cigarettes represents a combination of the two duty systems applied in the original six member states in 1972, when five of them had a wholly *ad valorem* duty related to retail price and one (Germany) had a specific duty per cigarette. This structure was quite different from the system then in operation in the UK, where duty was charged on the weight of leaf tobacco going into the factory irrespective of the nature of the product to be made from it.

Because of the magnitude of the change Britain's industry had to face, the UK sought, and was granted, a five-year derogation so that the EEC system did not have to be applied in this country to tobacco products in general, or cigarettes in particular, until 1 January 1978. It was, in fact, introduced in part in May 1976 but did not come fully into operation until the beginning of this year.

One aspect of the harmonised duty system for cigarettes which led to particular concern in this country was that it would remove the duty advantage which had traditionally been enjoyed by small filter-tipped cigarettes over plain (untipped) cigarettes when the duty was levied on the weight of tobacco. This change was unfortunate from the point of view of health because, as a general rule, plain cigarettes yield larger amounts of tar than filter cigarettes.

Medical and scientific evidence has shown that cigarettes with higher yields of tar are the most harmful to health and the Department of Health and Social Security is seeking in other ways, with the co-operation of the manufacturers, to discourage their use. It seemed anomalous that many of these cigarettes should bear a reduced duty burden.

Health considerations

The government considered, on the contrary, that health considerations could and should be taken into account in determining tax rates and that there was a case for imposing a heavier charge on the higher-tar cigarettes than others.

The first directive prohibited differential taxation for different cigarettes. The negotiation of the second stage however opened the way for some provision to be made for this, and the UK suggested that member states should be free to impose a supplementary duty for health reasons. In taking this initiative the UK sought to extend into Europe the practice which has been followed by the UK government in respect of smoking and health of recognising that health considerations are factors which should influence the formulation of government policies.

Derogation

Other member states understood the reasons which had prompted the UK initiative but they themselves were not ready to put it into practice as part of the second stage. They were however prepared to agree to a derogation allowing the UK alone to impose a supplementary duty on cigarettes with a tar yield of 20 mg or more during the second stage.

Such a supplementary duty must not exceed 20 per cent of the duty the cigarettes in question would otherwise have borne and must leave the specific proportion of total taxation within the limits agreed for the second stage. If the UK takes advantage of the opportunity to apply a supplementary duty, the EEC commission will study the impact which it has and the way in which it operates.

EEC information

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The EEC Information Unit helps firms of all types and sizes by answering general questions about EEC membership and by guiding them where necessary to more specialised information sources.
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The unit's address is : EEC Information Unit, Department of Industry, 1 Victoria Street, London, SW1H 0ET. Tel. 01-215 4301 (six lines).

Statistics

The economy: selected indicators

Series are seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
				of which			of which					
			Total	Manu-facturing industry	Distributive and service industries excl. shipping	Total	Manu-facturing industry	Whole-salers	Retailers	Current balance	Visible balance	Invisible balance
	at 1970 prices		at 1970 prices			at 1970 prices				at current prices		
Base of index Series in Stock level at end-1976	1970	£ million	£ million			£ million 18,041	10,528	1,830	1,929	£ million		
1970	100.0	31,696	9,453	2,130	1,799	444	325	68	−16	695	−25	720
1971	101.8	32,675	9,682	1,991	1,930	92	−148	52	18	1,058	280	778
1972	104.2	34,542	9,797	1,739	2,071	34	−145	48	15	106	−702	808
1973	110.4	36,062	10,253	1,753	2,414	1,321	597	102	379	−909	−2,353	1,444
1974	109.5	35,361	10,287	2,028	2,414	596	634	81	−109	−3,537	−5,194	1,657
1975	107.9	35,257	10,062	1,745	2,034	−743	−429	−111	−65	−1,647	−3,203	1,556
1976	110.1	35,405	9,724	1,659	1,974	66	5	23	9	−1,227	−3,571	2,344
1977		35,062 pe								59	−1,657	1,716
1976 1st qtr.	110.2	8,829	2,489	405	471	44	0	26	33	−65	−538	473
2nd qtr.	109.6	8,797	2,425	407	489	−57	−66	−20	−45	−350	−907	557
3rd qtr.	109.8	8,880	2,435	421	506	−1	−2	14	16	−446	−1,144	698
4th qtr.	110.8	8,899	2,375	426	508	80	73	3	5	−366	−982	616
1977 1st qtr.	109.8	8,761	2,248	419	507	155	125	51	102	−514	−928	414
2nd qtr.	110.0	8,665	2,231	432	509	235	164	39	−5	−305	−723	418
3rd qtr.	109.9	8,796	2,262	455	528	−81	−45	6	−44	405	−44	449
4th qtr.		8,840 pe								473	38	435 e
% change last 2 qtrs. on prev. 2 qtrs.	−0.3	+1.2	−2.8	+5.0	+2.2							
on a year earlier	+0.2	−0.8	−7.6	+7.1	+4.2							

	Industrial production		Personal expenditure		Prices and earnings					Labour (UK)			Visible trade (volume)	
	Total all indus-tries	Total manu-facturing industries	Retail sales	Cars: new regis-trations	Retail prices		Wholesale prices: all manufacturing industry		Average gross earnings of all employees (GB, all industries and services covered)	Unemployed excluding school leavers and adult students		Unfilled vacancies for adults	Export	Import
				monthly averages		% increase on a year earlier	basic materials and fuel used	manu-factured products: home sales		mid-month count	% of total em-ployees	mid-month count	On a balance of payments basis	
	at 1970 prices		at 1971 prices		(not seasonally adjusted)				(old series)				at 1970 prices	
Base of index £m in base year Series in	1970	1970	1971 16,296	thousands	Jan. 1974		1970	1970	Jan. 1970	thousands		thousands	1970 7,907	1970 7,932
1971	100.3	99.4	100.0	108.5	80.0	9.4	104.6	109.0	119.4	775.8	3.4	130.9	106.7	104.2
1972	102.5	102.0	105.3	138.6	85.7	7.1	109.2	114.8	134.8	854.9	3.7	147.3	107.1	116.7
1973	109.9	110.5	110.3	137.1	93.5	9.1	144.5	123.2	152.6	611.0	2.6	307.0	122.2	133.8
1974	106.9	108.8	109.0	102.8	108.5	16.0	215.3	152.0	179.6	599.7[1]	2.6[1]	302.7[1]	132.0	136.4
1975	101.5	102.2	106.7	97.2	134.8	24.2	235.4	188.7	227.6	929.0	3.9	150.0[1]	126.1	126.5
1976	101.9	103.0	106.5	104.7	157.1	16.5	299.0	219.6	263.3	1,269.8[1]	5.4[1]	120.4[1]	136.6	134.3
1977			103.8	107.1	182.0	15.8	340.1 p	261.7 p		1,378.2	5.8	155.3[1]	148.4	142.3
1977 1st qtr.	103.3	105.3	103.2	104	174.1	16.5	341.5	248.0	280.2	1,330.2	5.6	. .	141.9	142.4
2nd qtr.	101.9	103.2	102.6	102	181.9	17.4	347.7	259.2	285.2	1,330.4	5.6	159.2	149.9	144.8
3rd qtr.	102.6	103.5	104.6	112	184.7	16.5	340.5	267.7	288.4	1,420.8	6.0	150.5	153.7	142.0
4th qtr			104.9	110	187.4	13.1	330.8 p	272.1 p		1,431.5	6.1	157.2	148.0	139.9
1977 Feb.	103.2	105.3	104.0	118	174.1	16.2	339.5	248.2	278.7	1,331.4	5.6	150.5	139.5	133.9
Mar.	103.3	105.5	101.7	102	175.8	16.7	347.2	250.8	283.8	1,321.1	5.6	157.3	144.1	139.5
Apr.	102.3	103.4	102.3	108	180.3	17.5	349.7	255.4	283.1	1,322.6	5.6	158.5	150.5	139.2
May	103.5	104.9	103.2	108	181.7	17.1	348.3	259.8	286.2	1,315.9	5.6	161.2	146.1	143.9
June	99.9	99.9	102.3	90	183.6	17.7	345.2	262.4	286.2	1,352.9	5.7	157.8	153.2	151.3
July	102.5	103.9	105.0	110	183.8	17.6	344.5	265.8	286.5	1,402.2	5.9	152.7	153.5	149.3
Aug.	102.6	103.2	105.2	124	184.7	16.5	338.8	268.1	288.7	1,413.8	6.0	154.1	152.0	131.9
Sept.	102.7	103.5	103.9	103	185.7	15.6	338.1	269.2	290.1	1,446.4	6.1	144.7	155.7	144.9
Oct.	101.5	102.5	103.3	118	186.5	14.1	333.8	271.0	294.6 p	1,433.4	6.1	153.4	150.0	140.4
Nov.	102.1 p	103.0 p	103.8	107	187.4	13.0	329.9	272.0	300.2 p	1,432.9	6.1	155.6	142.9	133.2
Dec.			107.0	104	188.4	12.1	328.7 p	273.3 p		1,428.1	6.0	162.7	151.2 p	146.2 p
1978 Jan.							326.4 p	276.9 p		1,428.4 p	6.0	182.8 p		
% change latest 3 months on prev. 3 months	+0.4	+0.7	+0.3	−2.4	+1.5		−2.5	+1.7	+2.7	−0.1			−3½	−1½
on a year earlier	−0.4	−1.2	−0.9	−2.9	+13.1		−1.5	+14.7	+9.6	+7.8			+4½	+1

p Provisional pe Preliminary estimate e Estimate . . Not available [1] Average of available months

Inquiries: 01-215 3453

Government statistics

For more information, see the Guide to government statistics, published with Trade and Industry, 13 January 1978

Departmental responsibilities and contact points

Central Statistical Office
Great George Street, London SW1P 3AQ
01-233 followed by extension

- National income and expenditure, balance of payments, index of industrial production, financial statistics, input/output statistics, development of social statistics, regional statistics ext **6135/6193**
- Price indices for current cost accounting ext **7718/7661**
- Survey Control Unit ext **7341**
- Macro-Economic Databank ext **5401**

Industry, trade, prices

Departments of Industry, Trade and Prices and Consumer Protection

Business Statistics Office
Cardiff Road, Newport, Gwent NPT 1XG
Newport 56111

- General inquiries ext **2973**
- Production statistics:
  - Annual production statistics ext **2455**
  - Quarterly and monthly production inquiries ext **2337/2322**
  - Purchases inquiry ext **2369**
  - Classified list of businesses ext **2556**
- Distribution statistics:
  - Census of distribution 1971 ext **2000**
  - Annual retail inquiry ext **2070**
  - Annual inquiry into distributive and service trades, capital expenditure and stocks ext **2113**
- Census of production 1968 ext **2973**
- Minerals raised annual inquiry ext **2926**

Other offices
1 Victoria Street, London SW1H 0ET
01-215 followed by extension

- Wholesale price indices exts **3544, 3073**
- Capital expenditure and stocks, and investment intentions of private industry:
  - Manufacturing ext **3176**
  - Distributive and service trades ext **3345**
- Retail trades turnover ext **3705**
- Motor and catering trades turnover ext **3177**
- Hire-purchase and other instalment credit ext **3162**
- Aerospace ext **4052**
- Companies:
  - Acquisitions and mergers, liquidity, insolvencies ext **5538**
  - Analysis of accounts ext **3132, 5705**
- Insurance, private sector pensions funds ext **3162**
- Overseas trade:
  - Visible ext **3131**
  - Invisible ext **5176**
- Overseas direct investment and earnings ext **3135**
- Economic indicators:
  - Home ext **3453**
  - Industrial countries ext **3442**
- Statistical service for Department of Prices and Consumer Protection ext **4138**

Abell House, John Islip Street, London SW1P 4LN **01-211** followed by extension

- Scientifically qualified manpower ext **3125**
- R&D expenditure by industry ext **5156**

Cromwell House, Dean Stanley Street, London SW1P 3HY **01-212** followed by extension

- Shipping ext **6730**
- Tourism ext **5555**

Millbank Tower, Millbank, London SW1P 4QU
01-211 followed by extension

- Industrial development certificates ext **3324**
- Distribution of industry ext **6073**

Dean Bradley House, 52 Horseferry Road, London SW1P 2AG **01-212** followed by extension

- Manufacturing industries – production, sales, orders:
  - Steel and shipbuilding ext **5544**
  - Engineering ext **6044**
  - Non-ferrous metals ext **6532**
  - Motor vehicles ext **0788**
  - Chemicals ext **6937**
  - Textiles, clothing, footwear, leather, man-made fibres ext **6210**
- Other industries ext **6331**

Export House, 50 Ludgate Hill, London EC4M 7HU **01-248 5757 Telex: 886143 DTI Export Ldn**

- All foreign and Commonwealth statistics ext **337**

Statistics and Market Intelligence Library
ext **368**
Provides up-to-date and comprehensive trade statistics for all countries, and general statistical publications from all over the world. Overseas directories are also held. Reading room and copying facilities are available.

Agriculture

Ministry of Agriculture, Fisheries and Food
Whitehall Place, London SW1A 2HH
01-839 7711

- General inquiries exts **7000, 7024**
- National expenditure estimates on food ext **477**
- Food consumption estimates exts **388, 479**
- Agricultural incomes, etc exts **292, 296, 297, 565**
- Agricultural and food statistics for overseas countries ext **544**
- Market prices (livestock, dairy products, etc) ext **7058**

Great Westminster House, Horseferry Road, London SW1P 2AE **01-216** followed by extension

- Commodity production statistics ext **7501**
- Market prices (horticulture) ext **6711**
- Fisheries ext **6143**

49–53 Parliament Street, London SW1A 2NH
01-233 followed by extension

- Agricultural rents, land prices, etc ext **5454**

Government Buildings, Tolcarne Drive, Pinner, Middlesex HA5 2DT **01-868 7161**

- Agricultural prices indices ext **35**
- Wholesale price index (manufactured food and soft drinks) ext **108**
- National food survey: household food consumption and expenditure ext **44**

Government Buildings, Epsom Road, Guildford GU1 2LD **Guildford 68121**

- Agricultural censuses and surveys ext **518**

Customs and Excise

Customs and Excise
King's Beam House, Mark Lane, London EC3 7HE **01-626 1515**

- Statistics related to all indirect taxes administered by the department ext **2693**

Bill of Entry Service, Statistical Office,
Portcullis House, 27 Victoria Avenue,
Southend-on-Sea SS2 6AL
Southend 49421

- United Kingdom external trade statistics ext **310**

Employment

Department of Employment
Orphanage Road, Watford, Herts WD1 1PJ
Watford 28500

- Employment, unemployment, vacancies ext **403**
- Earnings, wage rates, hours of work ext **319**
- New earnings survey ext **500**
- Stoppages of work due to industrial disputes ext **673**
- Employers' labour costs ext **526**
- Index of retail prices ext **630**

26 King Street, London SW1Y 6RB
01-214 8627

- Family Expenditure Survey

PETER KNEEBONE

Energy

Department of Energy
Thames House South, Millbank, London SW1P 4QJ **01-211** followed by extension

- Fuel and energy ext **4292**
- Energy models ext **4550**

Environment, transport

Departments of the Environment and Transport
St Christopher House, Southwark Street, London SE1 0TE **01-928 7999**

- Roads ext **3045**
- Road traffic ext **2629**

2 Marsham Street, London SW1P 3EP
01-212 followed by extension

- Passenger traffic, road vehicles ext **8987**
- Public road passenger transport ext **8330**
- Inland freight transport, railways ext **7513**
- Road accidents ext **7452**
- Traffic of seaports ext **8323**
- Road goods transport ext **8297**
- Building materials exts **7147, 8411**
- Construction industries ext **7142**
- Planning and land use ext **4113**
- Local government financial statistics ext **4627**
- Population projections exts **8558, 8563**
- Household projections exts **8555, 8557**
- Housing ext **8651**

Health, social security

Department of Health and Social Security
Friars House, 157-168 Blackfriars Road, London SE1 8EU **01-703 6380**

- Social security statistics ext **4284**

42–46 Weston Street, London SE1 3QW
01-407 4411

- Personal social services ext **230**
- Health services ext **223**

Health and Safety Executive
Baynards House, 1 Chepstow Place, London W2 4TF **01-229 3456**

- Health and safety statistics

Overseas aid

Ministry of Overseas Development
Eland House, Stag Place, London SW1E 5DH
01-834 2377

- British aid to developing countries ext **265**

Population

Office of Population Censuses and Surveys
St Catherine's House, Kingsway, London WC2B 8JP **01-242 0262**

- Population and vital statistics (England and Wales):
  - National and local estimates of population ext **2249**
  - Regional demography and sub-national population projections ext **2183**
  - Overseas migration ext **2182**
  - National population projections, international data, marriages and general inquiries ext **2169**
  - Deaths, abortions, infectious diseases ext **2229**
  - Births ext **2162**
  - Divorces ext **2165**
- Social surveys ext **2292**
- Census of population, general inquiries exts **2009, 2013**

Changes in the external trade statistics for 1978

The external trade statistics are to be reclassified onto Standard International Trade Classification, revision 2 (SITC (rev 2)), starting with the January trade figures to be published in February. This change was described in an article in *Trade and Industry*, 21 October 1977. The export and import unit value and volume indices, currently on 1970 = 100, will be re-based onto 1975 = 100 and some small changes will be made to their methodology.

This article

- gives a brief description of the nature of these changes,
- provides a back-run of quarterly and annual data of value and of unit value and volume for (a) the total trade figures on a Balance of Payments (BoP) basis (table 1) and (b) the major area and commodity groups on an Overseas Trade Statistics (OTS) basis (tables 2 to 9), and
- outlines the general plans for publishing data on this new basis.

Changes to the classification

Three types of classification change are to be made to the value figures on an OTS basis in 1978. First, certain trade in non-monetary gold (previously shown in table VIII of the OTS) and second-hand aircraft, second-hand ships will be included in the main trade statistics for the first time. As an example of the magnitude of the change, in the new base year, 1975, the total OTS trade figures for exports and imports will be increased by about £200 million and £300 million, respectively. However, the BoP series are unaffected by the change since these items were previously included in the figures in the form of balance of payments adjustments.

Secondly, under SITC (rev 2), there will be some changes to the number of groupings at the division level – in particular the three divisions (71 to 73) under SITC(R) in section 7, machinery and transport equipment, will be expanded into the nine divisions (71 to 79).

Thirdly, as a result of the change to SITC (rev 2), there will be some switches in items between the various commodity groups. The largest revision occurs in 'other transport equipment' which includes second-hand aircraft and ships. The other changes in items which are of some importance (ie they affect the commodity group totals by over 5 per cent by value in 1975) are:

- exported wool tops from 'basic materials' to 'textiles',
- exported bicycles, caravans and trailers from 'other transport equipment' to 'road vehicles',
- certain imported non-monetary gold from a balance of payments adjustment to 'miscellaneous goods' in the main trade statistics, and
- imports of North Sea installations from 'machinery' to 'other transport equipment'.

The schedule below lists the main items which are to be switched between the major commodity groups. Table A gives, for each of the major commodity and area groups, value figures for 1975 both before and after these changes.

Changes to unit value and volume indices

The unit value and volume index numbers will be consistent with the value figures, so they, too, will be affected by the changes to the OTS classification described above. In addition, the figures will be on reference base 1975 = 100. The figures from 1975 onwards will have weights based on the pattern of trade in 1975, and those for the period prior to 1975 will have been obtained by a re-referencing of the series based on 1970 weights. The unit values underpinning the index numbers are compiled for a sample of the headings in the Tariff and Overseas Trade Classification and a new selection of headings has been made for the period from 1975 onwards. Some small changes have been made to the pricing assumptions for the non-selected headings and these have been applied to the figures from 1970 onwards. In particular, as part of the move towards publishing data according to the United Nations broad economic categories (BEC) classification, the 'blocks'[1] for section 7 and 8 for the 1975 based series have been defined according to the BEC classification within SITC (rev 2), whereas those for the 1970 based series were defined according to the SITC(R) classification only. So there are some revisions to the growth rates for 1970-75, as well as to the index numbers for 1975 onwards. These changes affect both the BoP and OTS series. An article analysing the changes in more detail will be published later this year.

Availability of other data on value, unit value and volume index numbers

Data from 1970 on the new basis for the minor commodity and area groups, and figures for 1977 for all the series, will be published as follows:

> The monthly figures on the current account of the balance of payments, to be issued by a press notice on 14 February, will give for the series shown in tables 1 to 9 of this article figures for 1977 and January 1978. These figures will also be published in *Trade and Industry*,
>
> The 'Monthly Review of External Trade Statistics', which will be available in late February/early March, will contain for all series data on the new definition for the period from 1970 onwards.

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[1] The 'block' is the lowest level at which index numbers are compiled. It is also the level at which the prices of the non-selected headings are assumed to move in line with the selected ones.

Schedule of major changes in the OTS classification to be introduced in 1978

Exports

Commodity group	Items of value £1m or over in 1975 added to or deducted from the SITC (R) figures [1]
Total trade	*Second-hand aircraft,* second-hand ships, *gold bullion* added
Food beverages and tobacco	No change
Basic materials	*Wool tops* deducted
Fuels	Mineral tar, *oil and other products of the distillation of coal tar* added
Manufactures	*Second-hand aircraft,* second-hand ships, *wool tops* added. Mineral tar, *oil and other products of the distillation of coal tar* deducted
Machinery and transport equipment	*Second-hand aircraft,* second-hand ships, *ground flying trainers, photocopying equipment, sound recorders and reproducers* added. *Electrical measuring and controlling instruments* deducted
Machinery	*Photocopying equipment, sound recorders and reproducers* added. *Electrical measuring and controlling instruments* and North Sea installations deducted
Road vehicles	*Bicycles, caravans and trailers* added
Other transport equipment	*Second-hand aircraft,* second-hand ships, *ground flying trainers* and North Sea installations added. *Bicycles, caravans and trailers* deducted
Chemicals	Mineral tar, *oil and other products of the distillation of coal tar, plastic floorcoverings* hunting and sporting ammunition deducted
Metals	Domestic sanitary ware made of iron and steel added
Textiles	*Wool tops* added
Other manufactures	*Electrical measuring and controlling instruments* added. *Photocopying equipment, sound recorders and reproducers,* domestic sanitary ware made of iron and steel, *ground flying trainers* deducted
Miscellaneous	*Gold bullion* added

[1] Items in italics involve switches between headings of more than £10 million in 1975.

Imports

Total trade	*Second-hand aircraft,* second-hand ships, *gold bullion* added
Food, beverages and tobacco	No change
Fuels	Mineral tar, *oil and other products of the distillation of coal tar* added
Industrial materials	Domestic sanitary ware made of iron and steel added. Plastic floorcoverings, hunting and sporting ammunition, mineral tar, *oil and other products of the distillation of coal tar deducted*
Basic materials	*Aluminium oxide* added. Wool tops deducted
Chemicals	*Aluminium oxide,* plastic floorcoverings, hunting and sporting ammunition, mineral tar, *oil and other products of the distillation coal tar* deducted
Other semi-manufactures	Wool tops, domestic sanitary ware made of iron and steel added
Finished manufactures	*Second-hand aircraft,* second-hand ships, plastic floorcoverings, hunting and sporting ammunition added. Domestic sanitary ware made of iron and steel deducted
Machinery and transport equipment	*Second-hand aircraft,* second-hand ships, *ground flying trainers photocopying equipment, sound recorders and reproducers* added. *Electrical measuring and controlling instruments* deducted
Machinery	*Photocopying equipment, sound recorders and reproducers* added. *Electrical measuring and controlling instruments, North Sea installations* deducted
Road vehicles	*Bicycles,* caravans and trailers added
Other transport equipment	*Second-hand aircraft,* second-hand ships, ground flying trainers and *North Sea installations* added. *Bicycles,* caravans and trailers deducted
Other finished manufactures	Plastic floorcoverings, hunting and sporting ammunition, *electrical measuring and controlling instruments* added. *Photocopying equipment, sound recorders and reproducers,* domestic sanitary ware made of iron and steel, ground flying trainers deducted
Miscellaneous	*Gold bullion* added

Table A Comparison of 1975 export and import values on SITC(R) and SITC(Rev 2) classifications

OTS basis

Export values

	SITC (rev 2) code[3]	SITC(R) value	SITC (rev 2) value	Difference between SITC(R) and SITC (rev 2)	
				Value	Per cent
		£ million	£ million	£ million	
TOTAL EXPORTS[1]		19 922	20 111	+189	+1
Commodity analysis[2]					
Food, beverages and tobacco	0 + 1	1 428	1 428	—	—
Basic materials	2 + 4	561	530	−31	−6
Fuels	3	814	827	+13	+2
Manufactures	5 to 8	16 459	16 655	+196	+1
Machinery and transport equipment	7	8 233	8 431	+198	+2
Machinery	71 to 77	5 782	5 782	—	—
Road vehicles	78	1 736	1 854	+118	+7
Other transport equipment	79	715	795	+80	+11
Chemicals	5	2 179	2 145	−34	−2
Metals	67 to 69	1 837	1 849	+12	+1
Textiles	65	699	729	+30	+4
Other manufactures	Rest of 6 + 8	3 511	3 501	−10	—
Miscellaneous	9	660	672	+12	+2
Area analysis[1]					
EEC		6 417	6 490	+73	+1
Rest of western Europe		3 369	3 385	+16	—
North America		2 329	2 370	+41	+2
Other developed countries		1 879	1 880	+1	—
Oil-exporting countries		2 277	2 292	+15	+1
Other developing countries		2 925	2 968	+43	+1
Centrally planned economies		667	667	—	—

Import values

	SITC (rev 2) code[3]	SITC(R) value	SITC (rev 2) value	Difference between SITC(R) and SITC (rev 2)	
				Value	Per cent
		£ million	£ million	£ million	
TOTAL IMPORTS[1]		24 128	24 423	+295	+1
Commodity analysis[2]					
Food, beverages and tobacco	0 + 1	4 335	4 335	—	—
Fuels	3	4 301	4 316	+15	—
Industrial materials	2, 4, 5, 6	8 341	8 331	−10	—
Basic materials	2 + 4	2 204	2 233	+29	+1
Chemicals	5	1 411	1 350	−61	−4
Other semi-manufactures	6	4 726	4 748	+22	—
Finished manufactures	7 + 8	6 663	6 906	+243	+4
Machinery and transport equipment	7	4 794	5 042	+248	+5
Machinery	71 to 77	3 614	3 338	−276	−8
Road vehicles	78	883	910	+27	+3
Other transport equipment	79	297	794	+497	+167
Other finished manufactures	8	1 869	1 864	−5	—
Miscellaneous	9	489	535	+46	+9
Area analysis[1]					
EEC		8 786	8 876	+90	+1
Rest of western Europe		3 571	3 594	+23	+1
North America		3 206	3 238	+32	+1
Other developed countries		1 849	1 917	+68	+4
Oil-exporting countries		3 265	3 288	+23	+1
Other developing countries		2 678	2 734	+56	+2
Centrally planned economies		735	738	+3	—

[1] The two sets of figures differ on account of second-hand aircraft, second-hand ships and non-monetary gold being included in the SITC (rev 2) figures. The total trade figures on BoP basiś are not affected by these changes. [2] The differences between the SITC(R) and SITC (rev 2) figures arise because of ([1]) and because of switches of items beween the commodity groups. Items of value over £1 million in 1975 affected by the re-classification are listed in the schedule.

[3] The only differences from SITC(R) are as follows:

	SITC(R) code
Machinery	Div 71 + 72
Road motor vehicles	Group 732
Other transport equipment	Rest of Div 73

During 1978, a limited amount of data will be compiled for the years 1963-69. This information will first be published in the 'Monthly Review of External Trade Statistics'.

References

'Standard International Trade Classification, Revision 2', published in 1975 by the United Nations, New York (references ST/ESA/STAT/SER,M/34/REV2)

'Guide to the Classification for Overseas Trade Statistics 1978', HMSO, £7.75.

'Monthly Review of External Trade Statistics', obtainable from the Statistics and Market Intelligence Library, Export House, 50 Ludgate Hill, London EC4M 7HU, price £3.00 (annual subscription including postage £36.00).

Inquiries: Economics and Statistics Division 5A Room 234, Department of Industry, 1 Victoria Street, London SW1H OET, tel. 01-215 5703 or 3385.

Notes to table 1

[1] Export unit value index as percentage of import unit value index.

[2] Export volume index as percentage of import volume index.

These figures differ slightly from those to be given in the press notice for January, but these revisions would also have affected any figures on an SITC (R) basis. The changes to the quarterly figures are mainly attributable to the regular, annual updating of the seasonal factors in the light of the most recent recorded OTS figures. The other major change is to the BoP import figures for 1976 which have been revised downwards by £60 million. The revision has been made in the light of the provisional analyses of the results of a survey, carried out by Customs Statistical Office, into the extent of 'Customs Uplift' included in the overseas trade statistics. For duty purposes, Customs applies uplift to those goods imported into the UK which are valued at a transfer price which is below the market price. For balance of payments purposes, the transfer price is the correct valuation, and hence uplift is deducted from the OTS imports figures as a BoP adjustment.

Table 1 Total trade: value, volume and unit value indices

Seasonally adjusted except Unit Values Balance of payments basis

	Exports fob	Imports fob	Visible balance	Unit value indices (not seasonally adjusted)			Volume indices		
				Exports	Imports	Terms of trade[1]	Exports	Imports	Relative volume index[2]
	£m	£m	£m	1975 = 100	1975 = 100	1975 = 100	1975 = 100	1975 = 100	1975 = 100
1970	8 121	8 146	−25	50.5	40.6	124.4	79.5	80.2	99.1
1971	9 060	8 781	+279	53.3	42.4	125.7	84.6	83.3	101.6
1972	9 450	10 151	−701	56.3	44.7	126.0	84.5	92.4	91.5
1973	12 115	14 469	−2 354	63.3	57.1	110.9	96.8	105.6	91.7
1974	16 539	21 734	−5 195	81.8	88.5	92.4	103.9	107.9	96.3
1975	19 462	22 667	−3 205	100.0	100.0	100.0	100.0	100.0	100.0
1976	25 422	28 932	−3 510	120.6	121.9	98.9	109.9	105.5	104.2
1970									
1st qtr	2 010	1 932	+78	49.9	40.5	123.2	80.2	76.6	104.7
2nd	2 006	2 070	−64	50.4	40.8	123.5	79.2	81.5	97.2
3rd	1 930	2 016	−86	51.4	40.9	125.7	74.7	79.2	94.3
4th	2 175	2 128	+47	51.7	41.0	126.1	83.8	83.4	100.5
1971									
1st qtr	2 075	2 122	−47	52.4	41.3	126.9	79.2	82.4	96.1
2nd	2 321	2 234	+87	53.3	42.9	124.2	87.6	84.2	104.0
3rd	2 350	2 172	+178	54.5	43.3	125.9	87.0	81.8	106.4
4th	2 314	2 253	+61	55.2	42.9	128.7	84.8	84.9	99.9
1972									
1st qtr	2 258	2 356	−98	55.6	43.4	128.1	82.9	88.2	94.0
2nd	2 343	2 465	−122	56.3	43.8	128.5	84.8	92.4	91.8
3rd	2 115	2 413	−298	58.0	45.8	126.6	74.8	87.1	85.9
4th	2 734	2 917	−183	58.4	47.5	122.9	95.4	102.0	93.5
1973									
1st qtr	2 754	3 088	−334	60.4	50.3	120.1	93.1	101.9	91.4
2nd	2 901	3 353	−452	62.3	54.1	115.2	95.2	103.4	92.1
3rd	3 147	3 760	−613	64.9	60.1	108.0	98.8	106.3	92.9
4th	3 313	4 268	−955	68.1	65.9	103.3	100.1	110.6	90.5
1974									
1st qtr	3 619	4 860	−1 241	74.8	79.3	94.3	100.7	106.5	94.6
2nd	4 152	5 514	−1 362	81.0	88.9	91.1	105.9	109.5	96.7
3rd	4 393	5 633	−1 240	84.9	91.5	92.8	107.2	108.9	98.4
4th	4 375	5 727	−1 352	89.1	94.1	94.7	102.0	106.8	95.5
1975									
1st qtr	4 674	5 586	−912	95.4	97.3	98.0	100.9	101.5	99.4
2nd	4 601	5 271	−670	97.7	97.9	99.8	97.0	96.0	101.0
3rd	4 844	5 836	−992	101.8	101.7	100.1	98.0	102.6	95.5
4th	5 343	5 974	−631	105.9	106.6	99.3	104.1	99.9	104.2
1976									
1st qtr	5 655	6 198	−534	109.7	109.9	99.8	106.2	100.3	105.9
2nd	6 171	7 080	−909	115.9	118.4	97.9	109.9	106.0	103.7
3rd	6 499	7 596	−1 097	122.9	124.5	98.7	110.0	108.3	101.6
4th	7 097	8 058	−961	130.2	133.8	97.3	113.5	107.3	105.8

Table 2 Exports by commodity

Seasonally adjusted values Overseas Trade Statistics basis £ million fob

					Manufactures[1]									
						Machinery and transport equipment[1]								
	Total	Food beverages and tobacco	Basic materials	Fuels	Total	Total	Machinery	Road vehicles	Other transport equipment[1 2]	Chemicals	Metals	Textiles	Other manufactures	Miscellaneous
SITC (rev 2)		0 + 1	2 + 4	3	5-8	7	71-77	78	79	5	67-69	65	Rest of 6 + 8	9
1970	8 170	514	253	210	6 913	3 411	2 236	874	302	775	962	418	1 347	280
1971	9 289	588	263	239	7 936	4 007	2 624	1 036	348	873	1 007	444	1 605	263
1972	9 906	660	302	242	8 418	4 206	2 753	971	482	951	1 018	468	1 775	285
1973	12 657	876	397	374	10 638	4 981	3,270	1 169	542	1 257	1 313	629	2 458	373
1974	16 820	1 063	552	782	13 907	6 322	4 256	1 398	669	2 113	1 718	774	2 980	515
1975	20 111	1 428	530	827	16 655	8 431	5 782	1 854	795	2 145	1 849	729	3 501	672
1976	26 024	1 692	735	1 265	21 616	10 383	6 994	2 377	1 012	3 007	2 362	972	4 892	715
1970 1st qtr	2 010	123	61	54	1 707	836	544	227	65	190	239	106	346	67
2nd	2 014	124	63	50	1 704	827	540	210	77	190	252	102	335	68
3rd	1 958	123	58	52	1 659	827	543	208	77	186	229	101	311	67
4th	2 188	144	70	55	1 843	920	609	229	82	209	242	109	356	77
1971 1st qtr	2 084	132	59	51	1 795	910	591	249	70	201	237	102	351	46
2nd	2 359	150	61	68	2 000	1 019	660	265	94	218	254	112	402	73
3rd	2 419	169	69	61	2 047	1 023	678	263	82	225	257	113	423	76
4th	2 427	137	74	60	2 094	1 056	695	259	103	229	260	118	429	67
1972 1st qtr	2 381	153	72	60	2 025	1 031	657	240	134	228	239	111	422	68
2nd	2 453	165	73	60	2 073	1 032	686	248	98	240	255	115	445	72
3rd	2 213	138	69	57	1 892	911	617	198	96	210	230	105	416	67
4th	2 859	204	88	64	2 427	1 232	793	285	155	272	294	136	492	78
1973 1st qtr	2 872	195	89	67	2 441	1 169	761	284	124	285	303	141	557	76
2nd	3 030	214	95	68	2 556	1 214	812	284	118	298	315	155	587	85
3rd	3 276	230	96	110	2 758	1 272	842	298	132	319	326	164	645	100
4th	3,480	236	118	129	2 883	1 326	855	303	169	355	369	169	668	114
1974 1st qtr	3 682	270	136	143	3 009	1 348	902	302	144	431	407	190	645	130
2nd	4 180	266	148	227	3 414	1 497	1 010	332	155	522	408	205	772	115
3rd	4 504	284	146	205	3 763	1 710	1 152	370	189	583	454	197	795	128
4th	4 453	243	122	207	3 720	1 768	1 192	394	181	578	449	182	769	142
1975 1st qtr	4 802	353	129	212	3 949	1 923	1 315	435	172	552	476	179	820	148
2nd	4 736	297	127	185	3 950	2 049	1 399	451	198	500	460	169	801	164
3rd	5 013	376	127	206	4 162	2 140	1 485	482	173	511	448	181	836	172
4th	5 560	401	147	223	4 593	2 320	1 582	487	251	581	465	201	1 044	188
1976 1st qtr	5 784	393	150	244	4 809	2,373	1 639	542	192	655	489	209	1 076	175
2nd	6 303	409	174	290	5 262	2 573	1 707	588	278	725	570	231	1 194	171
3rd	6 617	423	190	327	5 525	2 562	1 737	604	221	781	638	252	1 229	184
4th	7 320	469	221	403	6 019	2 874	1 910	644	320	846	665	280	1 393	186

[1] Includes North Sea installations. [2] Not seasonally adjusted.

Table 3 Exports by commodity: volume indices

Seasonally adjusted Overseas Trade Statistics basis Indices 1975 = 100

					Manufactures [1]							
						Machinery and transport equipment [2]						
	Total	Food, beverages and tobacco	Basic materials	Fuels	Total	Total	Machinery	Road vehicles	Chemicals	Metals	Textiles	Other manufactures
SITC (rev 2)		0 + 1	2 + 4	3	5-8	7	71-77	78	5	67-69	65	Rest of 6 + 8
Weights	1 000	71	26	41	828	419	287	92	107	92	36	174
1970	77.4	65	91	107	77	75	73	83	73	98	96	69
1971	84.2	70	92	108	85	82	81	90	79	105	101	80
1972	85.8	73	99	109	86	81	79	81	84	106	107	83
1973	97.8	88	103	114	98	90	89	90	103	121	124	98
1974	102.3	92	108	109	103	95	94	94	121	114	118	104
1975	100.0	100	100	100	100	100	100	100	100	100	100	100
1976	108.8	103	117	120	109	101	100	104	124	109	117	117
1970 1st qtr	77.6	63	89	114	77	75	73	89	72	99	98	72
2nd	77.0	63	93	105	77	74	71	81	73	102	93	70
3rd	73.4	61	82	106	73	72	70	78	68	92	93	63
4th	81.6	72	101	105	81	79	77	85	78	99	101	72
1971 1st qtr	77.0	64	83	97	78	77	74	89	75	98	94	71
2nd	86.3	73	87	120	86	85	82	93	79	106	101	81
3rd	86.9	79	97	107	87	83	83	89	81	107	102	83
4th	86.4	64	102	107	88	84	83	87	81	110	107	84
1972 1st qtr	84.8	70	99	107	85	82	78	81	83	102	103	82
2nd	86.0	74	101	111	86	80	79	84	86	107	105	86
3rd	75.9	60	88	107	77	70	70	66	74	95	97	77
4th	96.6	88	109	111	97	94	90	91	95	120	122	89
1973 1st qtr	94.2	82	100	104	95	87	85	90	98	121	122	95
2nd	96.1	87	101	103	97	88	89	87	100	121	126	97
3rd	99.2	90	101	134	100	91	91	89	106	119	126	98
4th	101.5	91	112	116	101	95	91	93	107	121	121	100
1974 1st qtr	99.0	102	125	89	99	87	87	85	119	123	133	96
2nd	103.1	92	113	121	103	92	92	89	120	111	128	109
3rd	106.5	96	105	113	108	102	100	100	127	110	113	109
4th	100.6	78	91	113	102	99	98	100	117	111	99	100
1975 1st qtr	100.4	103	97	107	100	98	97	101	104	107	98	100
2nd	96.7	85	95	94	98	101	101	100	93	102	95	94
3rd	98.1	105	97	99	98	99	101	100	95	95	100	93
4th	104.8	107	111	100	104	103	101	100	107	96	107	112
1976 1st qtr	105.2	103	108	103	105	101	101	105	116	99	110	112
2nd	108.5	101	115	115	110	103	100	107	125	111	116	116
3rd	108.3	103	116	122	109	97	97	102	127	113	119	116
4th	113.1	107	129	139	112	104	101	103	129	111	122	124

[1] Includes North Sea installations. [2] Indices for other transport equipment SITC (rev 2) 79 are not separately available.

Table 4 Exports by commodity: unit value indices

Not seasonally adjusted **Overseas Trade Statistics basis** **Indices 1975 = 100**

					Manufactures							
						Machinery and transport equipment [1]						
	Total	Food, beverages and tobacco	Basic materials	Fuels	Total	Total	Machinery	Road vehicles	Chemicals	Metals	Textiles	Other manu-factures
SITC (rev 2)		0 + 1	2 + 4	3	5-8	7	71-77	78	5	67-69	65	Rest of 6 + 8
1970	50.5	56	51	23	52	52	52	53	48	51	57	55
1971	53.2	60	53	26	55	56	55	59	50	51	58	57
1972	56.2	64	57	26	58	60	59	62	51	51	58	61
1973	63.2	71	72	38	64	65	64	67	55	59	69	71
1974	81.7	83	91	87	81	78	78	79	82	84	90	82
1975	100.0	100	100	100	100	100	100	100	100	100	100	100
1976	120.7	115	124	126	121	122	122	123	114	119	115	124
1970 1st qtr	49.8	56	50	22	52	51	51	52	48	51	57	54
2nd	50.4	56	50	22	52	52	52	53	47	52	57	54
3rd	51.4	58	52	23	53	53	53	54	49	52	57	55
4th	51.7	57	52	24	53	54	53	55	49	51	57	56
1971 1st qtr	52.4	58	53	25	54	55	54	57	48	51	57	56
2nd	53.2	59	53	26	55	56	55	58	50	52	58	56
3rd	54.4	61	54	27	56	58	57	61	50	51	58	58
4th	55.1	61	54	26	57	59	59	61	51	51	58	58
1972 1st qtr	55.6	62	55	26	57	60	59	62	51	51	58	60
2nd	56.2	63	56	27	58	61	60	62	51	51	59	60
3rd	57.9	64	59	26	60	63	62	64	52	52	59	63
4th	58.3	66	61	27	60	62	61	65	52	53	60	64
1973 1st qtr	60.4	68	67	31	62	63	62	65	53	55	63	67
2nd	62.2	71	70	32	63	65	64	67	55	58	68	69
3rd	64.8	73	73	37	66	66	65	69	55	62	71	73
4th	68.0	74	78	52	68	67	66	70	61	66	77	75
1974 1st qtr	74.8	77	82	76	74	74	73	74	69	73	80	78
2nd	81.0	83	95	89	80	77	76	77	81	84	89	80
3rd	84.9	87	99	88	84	80	81	79	86	91	94	84
4th	89.0	88	98	90	89	86	86	84	92	92	99	88
1975 1st qtr	95.4	95	100	95	95	94	94	94	100	97	99	93
2nd	97.6	97	100	94	98	97	97	98	101	98	98	97
3rd	101.9	100	98	99	102	103	103	105	100	102	99	103
4th	105.9	103	98	107	106	108	109	106	102	107	102	106
1976 1st qtr	109.8	107	107	114	110	112	113	110	106	109	105	110
2nd	116.1	114	119	121	116	118	119	118	110	112	110	118
3rd	123.0	117	132	127	123	125	125	127	116	123	117	123
4th	130.4	125	138	136	130	132	132	135	123	131	127	131

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[1] Indices for other transport equipment SITC (rev 2) 79 are not separately available.

Table 5 Exports by area

Seasonally adjusted values Overseas Trade Statistics basis £ million fob

		Developed countries					Developing countries			
	Total	Total	EEC	Rest of W. Europe	North America	Other	Total	Oil-exporting countries	Other	Centrally planned economies
1970	8 170	5 981	2 406	1 373	1 242	961	1 843	472	1 371	308
1971	9 289	6 752	2 722	1 520	1 447	1 064	2 218	585	1 633	285
1972	9 906	7 329	2 999	1 769	1 610	950	2 228	650	1 578	320
1973	12 657	9 572	4 106	2 293	1 954	1 220	2 628	809	1 819	413
1974	16 820	12 563	5 598	2 980	2 285	1 699	3 678	1 231	2 448	518
1975	20 111	14 125	6 490	3 385	2 370	1 880	5 260	2 292	2 968	667
1976	26 024	18 612	9 249	4 298	3 116	1 949	6 630	3 221	3 409	726
1970 1st qtr	2 010	1 455	578	330	314	232	461	118	343	89
2nd	2 014	1 473	592	345	300	236	458	111	346	79
3rd	1 958	1 445	602	329	293	221	418	107	311	68
4th	2 188	1 609	633	368	335	272	507	136	370	72
1971 1st qtr	2 084	1 521	604	346	312	258	492	123	368	64
2nd	2 359	1 740	703	389	371	277	547	141	406	69
3rd	2 419	1 729	693	380	400	256	588	157	431	75
4th	2 427	1 762	721	405	364	273	592	164	428	77
1972 1st qtr	2 381	1 729	706	418	376	229	569	164	406	76
2nd	2 453	1812	722	435	415	240	566	164	402	77
3rd	2 213	1 693	727	428	353	185	420	119	301	70
4th	2 859	2 095	844	488	467	295	673	203	470	97
1973 1st qtr	2 872	2 157	898	504	477	278	611	195	416	97
2nd	3 030	2 289	966	544	483	295	640	198	441	103
3rd	3 276	2 452	1 066	596	477	313	695	213	482	98
4th	3 480	2 675	1 175	649	516	334	682	202	480	114
1974 1st qtr	3 682	2 780	1 233	679	507	362	737	217	520	123
2nd	4 180	3 152	1 427	733	572	420	877	264	613	121
3rd	4 504	3 334	1 485	796	607	446	1 040	371	669	133
4th	4 453	3 296	1 453	772	599	472	1 025	378	646	141
1975 1st qtr	4 802	3 434	1 527	823	604	479	1 207	490	717	157
2nd	4 736	3 302	1 508	782	555	457	1 278	577	701	161
3rd	5 013	3 449	1 577	856	553	464	1 342	591	750	179
4th	5 560	3 940	1 878	925	658	480	1 434	635	799	170
1976 1st qtr	5 784	4 073	1 983	908	693	490	1 514	702	812	180
2nd	6 303	4 569	2 261	1 053	776	479	1 582	752	829	183
3rd	6 617	4 762	2 369	1 090	810	492	1 641	800	842	178
4th	7 320	5 208	2 636	1 247	837	488	1 893	967	926	186

Table 6 Imports by commodity

Seasonally adjusted values Overseas Trade Statistics basis £ million cif

				Industrial materials				Finished manufactures[1]						
									Machinery and transport equipment[1]					
	Total	Food beverages and tobacco	Fuels	Total	Basic materials	Chemicals	Other semi-manufactures	Total	Total	Machinery	Road vehicles	Other transport equipment[1,2]	Other	Miscellaneous
SITC (rev 2)		0+1	3	2, 4, 5, 6	2+4	5	6	7+8	7	71-77	78	79	8	9
1970	9 163	2 047	950	3 859	1 362	533	1 964	2 175	1 599	1 192	174	233	576	131
1971	9 980	2 176	1 253	3 840	1 278	549	2 013	2 558	1 860	1 274	283	303	698	153
1972	11 301	2 356	1 247	4 286	1 330	631	2 325	3 267	2 399	1 586	498	316	868	145
1973	16 067	3 094	1 733	6 235	1 977	862	3 396	4 798	3 506	2 414	668	424	1 291	208
1974	23 492	3 762	4 644	8 909	2 583	1 523	4 803	5 749	4 141	3 002	669	471	1 608	428
1975	24 423	4 335	4 316	8 331	2 233	1 350	4 748	6 906	5 042	3 338	910	794	1 864	535
1976	31 569	4 983	5 669	11 245	3 248	1 924	6 073	9 225	6 755	4 305	1 432	1 019	2 470	447
1970 1st qtr	2 161	498	216	925	328	125	472	489	354	268	34	52	135	33
2nd	2 315	502	217	1 004	353	129	522	564	420	298	43	79	144	31
3rd	2 274	518	251	928	322	132	474	533	394	298	43	52	139	31
4th	2 414	529	266	1 001	359	146	496	589	432	328	54	50	158	35
1971 1st qtr	2 406	544	296	924	327	138	460	618	458	315	60	83	161	30
2nd	2 517	558	317	967	320	138	509	633	457	309	68	80	176	41
3rd	2 495	543	312	965	318	137	509	631	453	313	72	68	177	37
4th	2 561	531	328	984	313	137	535	676	492	337	83	72	184	45
1972 1st qtr	2 643	581	314	977	304	151	522	748	558	353	110	95	190	35
2nd	2 747	582	297	1 052	327	158	567	770	567	374	121	73	203	41
3rd	2 696	560	307	1 005	301	145	559	783	566	392	117	57	217	35
4th	3 215	633	329	1 251	398	177	676	967	708	467	150	91	258	35
1973 1st qtr	3 399	719	326	1 326	434	182	711	1 033	769	513	155	101	264	40
2nd	3 753	745	377	1 439	463	199	778	1 138	831	571	156	104	307	49
3rd	4 220	804	457	1 621	512	226	884	1 255	916	635	183	97	339	64
4th	4 694	826	573	1 848	569	255	1 024	1 372	990	695	175	121	382	55
1974 1st qtr	5 277	870	973	2 042	593	325	1 123	1 348	956	717	152	88	392	75
2nd	6 009	929	1 221	2 303	661	397	1 245	1 452	1 044	758	155	131	408	88
3rd	6 078	968	1 201	2 335	683	422	1 230	1 444	1 039	743	181	116	405	113
4th	6 129	996	1 249	2 229	645	380	1 204	1 504	1 101	785	181	136	403	153
1975 1st qtr	6 002	1 068	1 059	2 127	582	353	1 193	1 593	1 160	803	208	149	433	174
2nd	5 660	983	954	1 955	542	303	1 109	1 632	1 194	806	227	161	438	131
3rd	6 281	1 118	1 104	2 045	531	313	1 201	1 878	1 405	829	230	347	473	117
4th	6 480	1 166	1 198	2 204	578	380	1 246	1 802	1 282	900	245	137	520	113
1976 1st qtr	6 763	1 081	1 282	2 409	678	413	1 319	1 855	1 310	899	271	141	544	103
2nd	7 753	1 245	1 381	2 706	768	472	1 466	2 336	1 745	1 026	333	386	591	117
3rd	8 208	1 261	1 491	2 910	872	497	1 541	2 390	1 754	1 122	391	240	636	117
4th	8 845	1 396	1 514	3 221	930	543	1 747	2 645	1 946	1 257	437	251	699	110

[1] Includes North Sea installations. [2] Not seasonally adjusted.

Table 7 Imports by commodity: volume indices

Seasonally adjusted values Overseas Trade Statistics basis Indices 1975 = 100

				Industrial materials				Finished manufactures[1]				
									Machinery and transport equipment[2]			
	Total	Food, beverages and tobacco	Fuels	Total	Basic materials	Chemicals	Other semi-manufactures	Total	Total	Machinery	Road vehicles	Other
SITC (rev 2)		0 + 1	3	2, 4, 5, 6	2 + 4	5	6	7 + 8	7	71-77	78	8
Weights	1 000	177	177	341	92	55	194	283	207	137	37	76
1970	80.7	103	113	88	127	83	74	56	57	61	38	52
1971	84.9	103	123	89	116	85	79	64	65	65	57	62
1972	93.2	105	123	97	118	97	88	80	82	83	89	74
1973	106.3	105	127	111	132	114	101	101	104	107	104	93
1974	107.4	101	120	113	119	124	109	103	105	115	90	98
1975	100.0	100	100	100	100	100	100	100	100	100	100	100
1976	106.4	102	100	112	119	122	106	109	108	104	127	110
1970 1st qtr	77.0	103	106	84	123	78	70	51	51	56	30	50
2nd	81.6	100	106	91	131	80	77	59	61	62	37	54
3rd	79.9	103	119	85	119	82	72	54	56	61	38	50
4th	84.5	104	121	93	134	91	77	59	61	66	47	56
1971 1st qtr	83.4	106	126	86	121	85	73	63	64	64	49	59
2nd	84.7	105	124	89	115	84	79	63	63	62	56	62
3rd	84.4	101	118	89	116	84	79	64	64	65	58	64
4th	87.0	98	126	92	114	86	85	68	69	71	67	65
1972 1st qtr	89.6	105	126	92	115	94	82	75	78	75	83	68
2nd	93.0	107	121	97	119	99	88	77	79	79	89	71
3rd	88.2	100	120	90	105	88	85	75	76	80	81	72
4th	102.0	107	123	108	133	107	98	92	95	96	102	84
1973 1st qtr	101.8	111	115	107	131	105	98	95	100	99	106	82
2nd	104.3	104	126	108	129	113	98	99	101	104	100	93
3rd	108.1	103	134	111	134	116	101	102	104	110	109	97
4th	110.8	101	130	116	135	121	107	108	110	116	101	102
1974 1st qtr	105.6	100	119	114	121	122	108	102	103	114	87	101
2nd	109.8	103	120	116	121	129	111	106	108	118	86	101
3rd	108.5	103	119	114	118	132	109	102	104	112	95	97
4th	105.8	98	122	109	115	113	106	102	106	114	91	92
1975 1st qtr	102.0	100	103	104	105	105	103	99	99	104	99	98
2nd	95.3	91	94	96	99	92	96	98	98	100	103	97
3rd	102.2	103	103	98	96	93	100	107	109	96	98	100
4th	100.5	106	101	102	100	110	101	97	94	100	100	105
1976 1st qtr	101.0	95	100	109	115	116	105	97	93	96	104	108
2nd	107.3	101	101	111	117	121	106	114	116	103	122	109
3rd	108.1	102	102	113	124	123	105	111	110	106	140	112
4th	108.9	108	98	115	119	126	109	114	115	113	140	112

[1] Includes North Sea installations. [2] Indices for other transport equipment SITC (rev 2) 79 are not separately available.

Table 8 Imports by commodity: unit value indices

Not seasonally adjusted Overseas Trade Statistics basis Indices 1975 = 100

				Industrial materials				Finished manufactures				
									Machinery and transport equipment [1]			
	Total	Food, beverages and tobacco	Fuels	Total	Basic materials	Chemicals	Other semi-manufactures	Total	Total	Machinery	Road vehicles	Other
SITC (rev 2)		0 + 1	3	2, 4 5, 6	2 + 4	5	6	7 + 8	7	71-77	78	8
1970	42.2	46	19	50	47	44	56	52	52	52	50	53
1971	44.2	49	23	50	48	45	54	55	55	55	54	55
1972	46.1	52	23	51	49	46	55	59	59	57	63	58
1973	58.5	68	31	66	66	55	71	67	67	66	71	69
1974	88.9	88	87	96	97	92	96	79	78	76	83	84
1975	100.0	100	100	100	100	100	100	100	100	100	100	100
1976	122.5	113	131	121	123	120	121	125	127	127	128	121
1970 1st qtr	41.9	45	18	51	46	45	57	52	52	52	50	53
2nd	42.4	46	18	51	47	45	57	52	52	52	51	52
3rd	42.5	46	19	50	47	45	56	53	53	53	51	54
4th	42.7	46	19	50	47	44	54	54	54	54	51	55
1971 1st qtr	43.4	47	21	50	47	45	53	55	56	55	55	54
2nd	44.8	49	23	51	48	46	54	56	57	56	54	56
3rd	44.9	49	24	50	48	46	54	56	56	56	55	56
4th	44.4	49	23	50	47	45	53	56	56	55	56	57
1972 1st qtr	44.7	51	23	50	47	45	54	56	56	55	60	57
2nd	45.3	51	22	50	48	44	54	58	58	56	64	58
3rd	47.1	52	23	52	50	46	56	62	62	60	64	61
4th	48.9	56	24	54	53	47	58	62	62	60	66	63
1973 1st qtr	51.7	60	25	58	58	49	61	64	63	63	65	65
2nd	55.7	67	27	63	63	51	66	66	65	64	71	68
3rd	61.4	73	30	69	68	58	74	72	72	71	75	73
4th	67.4	78	40	76	75	63	81	73	73	71	78	75
1974 1st qtr	80.4	83	73	86	85	78	88	76	75	74	80	79
2nd	89.4	87	91	96	96	90	97	79	77	76	83	83
3rd	91.5	88	90	100	102	98	98	83	80	79	85	89
4th	93.8	92	92	100	102	102	98	86	83	81	89	93
1975 1st qtr	97.0	99	95	99	100	99	98	93	92	92	94	96
2nd	98.0	100	94	98	98	98	98	97	97	97	98	97
3rd	101.6	100	99	101	100	100	101	103	103	103	105	103
4th	106.5	102	110	104	104	103	104	108	108	108	109	108
1976 1st qtr	110.4	105	118	107	106	108	107	113	115	115	115	110
2nd	119.1	112	127	117	118	117	117	122	124	124	124	117
3rd	125.6	114	135	125	127	123	124	129	130	132	128	124
4th	134.4	120	142	135	141	130	134	138	139	139	140	136

[1] Indices for other transport equipment SITC (rev 2) 79 are not separately available.

Table 9 Imports by area

Seasonally adjusted values Overseas Trade Statistics basis £ million cif

		Developed countries					Developing countries			
	Total	Total	EEC	Rest of W. Europe	North America	Other	Total	Oil-exporting countries	Other	Centrally planned economies
1970	9 163	6 549	2 485	1 323	1 878	864	2 203	833	1 370	389
1971	9 980	7 164	2 985	1 479	1 752	947	2 420	1 069	1 351	376
1972	11 301	8 379	3 586	1 845	1 807	1 142	2 469	1 040	1 429	432
1973	16 067	11 885	5 291	2 735	2 394	1 465	3 563	1 507	2 056	595
1974	23 492	16 241	7 799	3 491	3 269	1 683	6 485	3 815	2 670	744
1975	24 423	17 625	8 876	3 594	3 238	1 917	6 022	3 288	2 734	738
1976	31 569	22 569	11 510	4 645	4 280	2 134	7 860	4 296	3 564	1 109
1970 1st qtr	2 161	1 563	588	304	450	221	515	189	326	90
2nd	2 315	1 624	595	326	498	206	556	192	364	102
3rd	2 274	1 630	632	330	451	217	558	229	329	89
4th	2 414	1 732	671	363	479	219	574	224	351	108
1971 1st qtr	2 406	1 743	693	362	468	220	575	242	333	99
2nd	2 517	1 775	732	351	446	246	615	277	338	92
3rd	2 495	1 805	762	367	430	246	604	269	335	91
4th	2 561	1 841	798	399	409	236	625	281	344	94
1972 1st qtr	2 643	1 959	820	421	452	267	594	254	340	90
2nd	2 747	2 016	887	447	419	264	591	241	350	107
3rd	2 696	2 014	870	453	421	271	600	268	332	91
4th	3 215	2 390	1 009	524	516	341	684	278	406	144
1973 1st qtr	3 399	2 562	1 097	572	537	356	729	281	447	133
2nd	3 753	2 806	1 264	618	553	370	794	324	470	132
3rd	4 220	3 131	1 406	766	607	352	940	395	545	150
4th	4 694	3 386	1 524	779	696	387	1 100	507	593	180
1974 1st qtr	5 277	3 655	1 722	814	738	380	1 494	872	622	185
2nd	6 009	4 062	1 947	881	831	403	1 709	996	713	187
3rd	6 078	4 247	2 064	906	834	444	1 665	978	687	180
4th	6 129	4 277	2 066	890	865	456	1 617	970	647	191
1975 1st qtr	6 002	4 349	2 171	849	864	465	1 527	833	695	180
2nd	5 660	4 101	2 067	784	759	491	1 385	761	624	164
3rd	6 281	4 516	2 219	1 014	812	472	1 533	864	669	182
4th	6 480	4 659	2 420	948	802	489	1 576	830	746	212
1976 1st qtr	6 763	4 788	2 458	1 001	877	451	1 682	924	759	254
2nd	7 753	5 633	2 953	1 116	1 060	503	1 883	999	884	301
3rd	8 208	5 780	2 835	1 247	1 134	564	2 100	1 177	923	270
4th	8 845	6 369	3 264	1 280	1 209	616	2 195	1 196	999	284

Manufacturers' prices rose 1¼ per cent in January

The provisional price index for the home sales of manufactured products increased by 1¼ per cent in January to 276.9 (1970 = 100). Some of this increase can be attributed to the annual bunching of price increases at the beginning of the year. This is the smallest January increase since 1973.

The index for manufactured products other than food, drink and tobacco was 1½ per cent higher as a result of increases spread across most sectors. This index rose 2½ per cent in the latest three months compared with 6 per cent in the corresponding period a year earlier.

Higher prices across a range of products, especially milk, partially offset by lower coffee prices were responsible for the ½ per cent increase in January in the index for the output of the food manufacturing industries. This index increased by 1 per cent in the latest three months.

The change in the index for all manufactured products measured over a 12-month period fell sharply, from 15¼ per cent in December to 13 per cent in January.

Input prices

The provisional price index for materials and fuel purchased by manufacturing industry fell by ¾ per cent in January to 326.4. This index has now fallen for nine successive months, and is 3½ per cent lower than in January 1977.

The index for *materials* purchased by manufacturing industry other than the food, drink and tobacco industries fell by 2½ per cent in January, mainly because of the effect of the further appreciation of sterling on import prices. Crude oil accounted for half the fall, and other significant contributors were non-ferrous metals and woodpulp. This index has fallen by 4¾ per cent in the latest three months.

The 2¾ per cent rise in January in the index for materials purchased by the food manufacturing industries was the result of higher prices for both home-produced and imported materials, in particular milk, fish, imported cereals and tea; these higher prices were partially offset by lower prices for cocoa beans.

Higher electricity prices were responsible for the 1 per cent increase in the index for coal, gas and electricity.

1970 = 100

	Nov	Dec p	Jan p
Output prices (home sales)			
All manufactured products	272.0	273.3	276.9
Products of manufacturing industry other than food, drink and tobacco industries	279.3	280.5	284.6
Products of the food manufacturing industries	292.8	295.7	297.2
Prices of materials and fuel purchased			
By manufacturing industry	329.9	328.7	326.4
materials	335.8	334.5	331.7
coal, gas and electricity	273.3	273.6	276.6
By manufacturing industry other than food, drink and tobacco industries	344.1	342.3	335.3
materials	354.2	352.1	343.7
By food manufacturing industries	303.0	302.8	310.9
materials	302.6	302.4	310.8

p Provisional.

Inquiries: 01-215 3351.

Rebasing of retail sales indices

The monthly index numbers of retail sales have been rebased on the final results of the census of distribution for 1971. The principal elements of the exercise are, first, changes to the sales estimates for 1971 used to weight together estimates for individual kinds of business, which make only small differences to recent figures, and, second, improvements to the specially constructed price indices used to adjust the value of sales at current prices to produce estimates at constant prices, which affect such volume estimates of retail sales by relatively small amounts for periods since 1971. There are larger revisions to years before 1971 because of the different rate of growth between 1966 and 1971 implied by the final, as opposed to the provisional, 1971 census results.

Since November 1973, the statistics have been based on the provisional results of the census of distribution for 1971 and have been given in index number form with 1971 = 100 (an article describing that rebasing was published in *Trade and Industry*, 8 November 1973). The current exercise has aligned the estimates to the final results of the census in a similar way to that used to align estimates to the provisional results of the census in the earlier exercise.

When the rebasing on the provisional results of the 1971 census was carried out it was the intention then to fully rebase the retail sales estimates on the final results of the census when the information became available. However the final results were later than had been expected with the last of the information needed for full rebasing not being available until the end of 1976. Early in 1977 work on the retail sales index and on the full rebasing exercise in particular was reviewed. There was at that time still a very substantial amount of work outstanding to complete the full rebasing exercise which would have involved, among other things, changes to the size groups used in the calculation; the reclassification of contributors, where necessary, to different kinds of business such as grocers and butchers, and forms of organisation such as independent retailers (those with fewer than 10 shops) and multiple retailers (those with 10 or more shops); the recalculation of the monthly pattern of sales in the base year; and the re-estimation of sales by kind of business and form of organisation for every month from the beginning of 1972 using the percentage change in turnover compared with a year earlier shown by the reclassified sample of retailers.

Since the censuses of distribution have now been discontinued (see *Statistical News* no. 31, November 1975) and replaced by a series of regular annual sample retailing inquiries, the first of which is being conducted in respect of 1976, there is also a need to devote resources to aligning the monthly retail sales inquiry with the new annual sample retailing inquiries. It is desirable that this should be accomplished soon after the availability of the full results of the first of these annual sample retailing inquiries; it is therefore planned to take place early in 1979.

In the review of work on the retail sales index it was clear that it would not be possible, within available resources, to conduct the full rebasing exercise and to carry out the work necessary to align the monthly inquiry with the annual sample inquiries by early 1979. The work involved in full rebasing seemed likely to take over one year. It was therefore decided not to conduct the full rebasing exercise but to devote the necessary resources to align the retail sales inquiry to make it consistent with the new annual sample retail inquiries. It was, however, decided to make some simple, but important, changes to the index which are introduced here and described below in order to maintain the index as a good short-term indicator of the movements in retail sales.

Rebasing on the final census results

For this exercise, with the exception of the series for retail co-operative societies and for gas and electricity show-rooms which have been fully reviewed, the component series, such as independent grocers, are unchanged from 1971 and subsequent years. The component series are now being combined according to the value of sales shown by the final census results to provide the aggregate series, eg for all grocers and all food shops. The calculations have been carried out monthly from January 1971. Prior to 1971 annual index numbers for all the component series have been derived, separately for each series, by adjusting the growth pattern shown by the monthly inquiry between 1966 and 1971 to agree with the growth between the 1966 and 1971 censuses.

The second main component of this exercise has been to review the calculation of the volume of sales. To measure the volume, the estimated value of monthly sales for each kind of business is adjusted to constant prices by a specially constructed price index to obtain an estimate of the value of sales at constant 1971 prices, which is then converted to index number form. The constant price figures for each kind of business are combined to form aggregates for broad categories of shop. The price indices used for adjusting sales by the various kinds of business to constant prices are constructed from detailed price information provided by the Department of Employment, which is primarily collected for constructing the retail price index. The weights used for constructing the price deflators are derived from two sources. The relative importance of broad categories of commodity in sales by particular kinds of shop are derived from the commodity analysis of retail sales collected in the census of distribution. Within each of these broad categories the more detailed weights are essentially those used in the construction of the retail price index. In this rebasing exercise the change has been to update the weighting patterns from the 1966 position to the more up-to-date 1971 position. These new patterns are based on the commodity sales data from the 1971 census. They also take in the detailed weights from the retail price index for 1971 which allowed quite significant improvements to be made to the deflators used for certain non-food kinds of business because of more detailed quotations being collected for the retail price index in 1971 compared with 1966. After adjusting the value series to constant prices the resulting series have been weighted together according to the pattern of trade shown by the 1971 census to obtain the aggregate volume series. The deflators have been changed monthly from January 1971.

The third change has been to recalculate the seasonal adjustments for the four broad kinds of business – food shops, clothing and footwear shops, durable goods shops and other non-food shops – for both the value and the volume series. These reflect the slightly different seasonal pattern of the new unadjusted series, the experience of recent months and minor changes to the allowances made to remove from the seasonally adjusted series the effects of the timing of holidays which now include a new allowance for the effect of the new year bank holiday in the last two years. As before, the series for all kinds of business and for non-food shops are derived by weighting together the appropriate component series.

Effect of rebasing

The effect of not fully rebasing means that certain elements of the pattern of trading that applied in 1966 are still built into the retail sales index though the effect of this has been reduced by aligning the index with the final 1971 census results in the rebasing exercise. In particular there has been no reclassification of the panel of constributors by size, kind of business or form of organisation since 1966 so that for the purposes of compiling the index each contributor is assumed to have a business similar to the business he had in 1966. However, where it has become clear that a business has changed substantially in nature the contributor is given a reduced weight or other special treatment. Additionally, until recently, the lack of a standing comprehensive register has precluded the carrying out of periodic recruitment to the inquiry with the result that there is a tendency for many of the new and in some cases faster-growing businesses not to be included in the inquiry. (Systematic recruitment of contributors to improve the representativeness of the panel is one of the tasks being carried out in aligning the retail sales index to the new annual sample retailing inquiries.) There is no doubt that such factors are tending to reduce the reliability of the retail sales index over the longer term especially at the level of the component series. However, the index is still considered to be a valuable indicator of short-term movements in retail sales.

For retailing as a whole, the final 1971 census results showed an increase in the value of sales of 41 per cent between 1966 and 1971, compared with an increase of over 37 per cent in the provisional census results and the 33 per cent derived from the monthly sample inquiry over this period. (The reasons for the differences between the census results and the monthly inquiry were discussed in the article of 8 November 1973.) The changes in the volume figures before 1971 mainly reflect those in the value series. In general the effect of this rebasing exercise on the statistics for 1971 and subsequent years compared with those previously published is relatively small.

Detailed statistics

The new detailed monthly statistics from January 1974 will be published in the Service and Distribution series of the Business Monitor (references SD1, SD2, SD3 and SD4) later in February. Longer series from January 1971 will be circulated to some contributors and will be available on request in a few weeks time from Retail Sales Section, Room 341, Department of Trade, Sanctuary Buildings, 16-20 Great Smith Street, London SW1P 3DB, tel. 01-215 3506. Annual index numbers for 1966 to 1970 for those series which are published separately in the Monitors are also available on request. For the volume series in table 1 and the all kinds of business value series in table 2, quarterly series from the first quarter 1972 and annual figures from 1966 will be published in the February issue of *Economic Trends*. Monthly indices back to 1961 are available on request for all of the series identified in tables 1 and 2.

Business names and limited partnerships in Great Britain in 1977

During the year ended 31 December 1977, there were 117 015 new registrations under the Registration of Business Names Act 1916 (as amended by the Companies Act 1947). A total of 11 883 statements showing changes in particulars were filed during the period and 11 321 names were removed from the register.

There were 94 new registrations under the Limited Partnership Act 1907.

Official reserves in January

UK official reserves rose by $311 million (£159 million) during January. During the month net accruals of foreign currency borrowing by the public sector under the exchange cover scheme were $73 million (£37 million). At the end of January the reserves stood at $20,868 million (£10,691 million).

Retail sales in December

The monthly index numbers of retail sales have been revised. The new series are now rebased on the final instead of the provisional results of the census of distribution 1971 and the volume indices have incorporated improved price deflators (see opposite page). Because of that the level of the volume indices is rather lower on the new basis but the monthly pattern of trade is similar.

Volume

The final seasonally adjusted index of the volume of retail sales in December is 107.0 (1971 = 100) close to the provisional figure of 106½, expressed on the new basis. The series continues to suggest an increase in the volume of trade in December of about 3 per cent compared with November, perhaps partly due to the tax-free bonus for pensioners and the effect of the backdated reduction in income tax.

In the fourth quarter of 1977 the volume of retail sales was marginally higher than in the previous quarter. However, the average level of trade during 1977 was about 2½ per cent below the annual average for 1976.

For the main components of total trade, the volume of sales by food shops in the fourth quarter was 1 per cent higher than in the previous quarter. Sales by clothing and footwear shops also rose by 1 per cent while sales by durable goods shops were little changed and sales by 'other non-food' shops, which include department stores and mail-order

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Table 1 Volume of retail sales seasonally adjusted

Index numbers of sales per week (average 1971 prices) 1971 = 100

(Sales in 1971 – £ million Final estimates)	All kinds of business (16,296)	Food shops (6,866)	Non-food shops Total (9,430)	Clothing and footwear shops (2,436)	Durable goods shops (1,897)	Other non-food shops [2] (5,097)
1971	100.0	100.0	100.0	100	100	100
1972	105.3	101.6	107.9	104	113	108
1973	110.3	101.6	116.6	108	127	117
1974	109.0	102.4	113.8	106	122	115
1975	106.7	100.0	111.5	106	119	111
1976	106.5	98.7	112.1	106	122	111
1977	103.8	94.8	110.4	105	119	110
1975						
1st qtr	109.5	101.7	115.2	109	126	114
2nd	108.5	99.9	114.7	106	130	113
3rd	104.3	98.9	108.2	105	110	109
4th	104.2	99.3	107.8	103	110	109
1976						
1st qtr	105.9	99.5	110.6	105	117	111
2nd	106.9	99.6	112.1	106	122	111
3rd	107.3	99.1	113.2	106	125	112
4th	105.9	96.6	112.6	105	124	112
1977						
1st qtr	103.2	94.9	109.3	105	116	109
2nd	102.6	94.7	108.3	101	118	108
3rd	104.6	94.4	112.1	107	121	111
4th	104.9	95.3	111.8	109	121	110
1976						
December [1]	105.2	96.2	111.8	105	123	111
1977						
January	104.5	95.2	111.3	106	121	110
February	104.0	95.2	110.5	105	118	110
March [1]	101.7	94.4	106.9	103	109	108
April	102.3	94.3	108.1	101	118	108
May	103.2	95.0	109.1	104	117	109
June [1]	102.3	94.7	107.8	99	118	108
July	105.0	94.3	112.7	107	125	111
August	105.2	94.4	113.1	110	118	113
September [1]	103.9	94.4	110.8	106	121	110
October	103.3	94.2	109.8	103	120	109
November	103.8	93.9	110.9	107	118	110
December [1]	107.0	97.3	114.1	114	125	110
1977						
July-September	104.6	94.4	112.1	107	121	111
October-December	104.9	95.3	111.8	109	121	110
Percentage increase	0.3	1.0	–0.3	1	—	–1

[1] Five-week period.
[2] Including department stores and mail-order businesses.

Table 2 Value of retail sales seasonally adjusted

Index numbers of value of sales per week (current prices) 1971 = 100

(Sales in 1971 – £ million Final estimates)	All kinds of business (16,296)	Food shops (6,866)	Non-food shops Total (9,430)	Clothing and footwear shops (2,436)	Durable goods shops (1,897)	Other non-food shops [2] (5,097)
1971	100.0	100.0	100.0	100	100	100
1972	112.0	109.0	114.2	112	118	114
1973	126.9	123.0	129.8	128	136	128
1974	146.7	144.9	148.1	148	144	149
1975	174.4	175.0	174.0	171	168	178
1976	200.1	204.8	196.7	189	187	204
1977	228.4	234.7	223.8	216	206	234
1975						
1st qtr	165.2	162.5	167.2	168	161	169
2nd	175.0	173.0	176.5	170	182	178
3rd	176.6	179.4	174.6	173	162	180
4th	181.5	186.0	178.3	173	166	185
1976						
1st qtr	189.6	193.4	186.8	179	177	194
2nd	196.1	200.3	193.0	187	185	199
3rd	203.4	208.0	200.1	193	190	207
4th	211.4	217.4	207.0	198	197	215
1977						
1st qtr	216.4	223.8	211.1	204	192	222
2nd	222.2	230.4	216.1	204	202	227
3rd	234.9	239.4	231.6	224	213	242
4th	240.1	245.3	236.4	231	219	245
1976						
December [1]	212.7	219.1	208.0	200	196	216
1977						
January	215.7	221.9	211.2	203	197	221
February	217.4	224.0	212.6	204	196	223
March [1]	216.2	225.0	209.8	204	185	222
April	220.1	226.8	215.2	201	205	226
May	222.7	230.3	217.2	209	199	228
June [1]	223.4	233.5	216.0	202	202	228
July	231.9	236.6	228.5	220	213	238
August	236.7	239.5	234.7	230	209	246
September [1]	235.7	241.4	231.6	222	217	242
October	235.3	241.7	230.6	218	214	243
November	237.3	242.3	233.7	228	213	244
December [1]	246.3	250.6	243.1	244	227	249
1977						
July-September	234.9	239.4	231.6	224	213	242
October-December	240.1	245.3	236.4	231	219	245
Percentage increase	2.2	2.5	2.1	3	3	1

[1] Five-week period.
[2] Including department stores and mail-order businesses.

businesses, fell by 1 per cent between these periods.

Compared with 1976 there was a 4 per cent fall in the volume of sales by food shops and a fall of 1½ per cent for non-food shops in 1977.

Value

Based on non-seasonally adjusted data, the value of total retail sales in December was 16 per cent higher than in December 1976. In 1977 as a whole, the value of sales was 14 per cent higher than in 1976.

The indices for all shops, food shops, and total non-food shops are shown to the first decimal place to help interpretation, but should not be regarded as necessarily accurate to the final digit. The best indication of the recent trend is normally obtained by comparing the average index for the latest three months with the average for the immediately preceding three months, but month-to-month fluctuations may sometimes make it preferable to average two months or four months.

When using the volume figures, it should be borne in mind that, when price increases are large, the various problems associated with revaluation of the value series to constant prices become more acute. Thus, the relative accuracy with which volume changes have been measured is likely to have been reduced in recent periods.

The monthly periods consist of four weeks except those marked [1] which are of five weeks. The December 1977 sales period was the five weeks from 27 November 1977 to 31 December 1977. The corresponding period in 1976 was the five weeks from 28 November 1976 to 1 January 1977.

The value estimates are compiled inclusive of VAT, and will, therefore, reflect changes in the rates of VAT. The volume estimates, however, are not affected by these changes since the retail price indices used to 'deflate' the value data are themselves inclusive of VAT.

Within the total, sales are analysed by 'kinds of business'; ie the statistics are of sales by particular kinds of shop rather than of sales of particular commodities. For example, while sales by shops classified as food shops are mainly of food, many of them also sell other goods. Similarly, some food is sold by shops classified to other kinds of business.

The seasonally adjusted series include, where appropriate, adjustments for the timing of holidays and adjustments to make allowance for the inclusion of an extra week in the January 1975 trading period. No adjustments are made to the non-seasonally adjusted data.

The article giving the *provisional* estimate of the seasonally adjusted index of the volume of retail sales for January and the increase in the value of sales compared with a year earlier will be published later this month.

Hire purchase and other instalment credit business in December

Finance houses and retailers advanced £414 million in new instalment credit agreements in December, after allowing for seasonal factors. Within this total, finance houses' lending increased over recent months. Retailers' lending (which has been rebased on the results of the 1971 census of distribution since the last *Trade and Industry* article, 13 January 1978, was published – see opposite) was lower than in preceding months. In the fourth quarter of 1977 total advances were 3 per cent higher than in the third quarter. Finance houses' lending increased by 6 per cent between the two quarters; retailers' lending increased by 1 per cent. Total lending during 1977 was about 24 per cent higher than in 1976. The growth in finance houses' lending (35 per cent) was greater than that in retailers' lending (16 per cent).

The average weekly value of retailers' instalment credit sales in December was lower than in the four preceding months. In the fourth quarter of 1977 average sales were 1 per cent lower than in the third quarter.

Within the total, durable goods shops' credit sales were unchanged between the two quarters, department stores' sales increased by 2 per cent and other instalment credit retailers' sales (mainly mail-order business) decreased by 2 per cent. In 1977 as a whole credit sales by retailers increased by 17 per cent compared to 1976. Durable goods shops' credit sales increased by 4 per cent, department stores' by 5 per cent and other instalment credit retailers' by 23 per cent between the two years.

Debt outstanding

The debt outstanding to finance houses and retailers increased by £61 million in December, bringing the total increase during the fourth quarter to £162 million, compared to £188 million in the previous quarter. Amounts outstanding to finance houses increased by £143 million and those to retailers by £19 million during the fourth quarter. The total increase in debt outstanding during 1977 amounted to £625 million: 80 per cent (£500 million) of this increase was to finance houses. At the end of 1977 the total amount outstanding on instalment credit agreement with retailers and finance houses was £3,341 million (not seasonally adjusted), 23 per cent more than at the end of 1976.

Rebasing of retailers' instalment credit series

Series for the instalment credit business of retailers have been rebased to take account of the results of the census of distribution for 1971. The census provided, inter alia, new benchmark figures for the monthly inquiry and the previous base of 1966 = 100 has now been changed to 1971 = 100.

Due to unexpected delays in the availability of the results of the 1971 census it has been decided not to fully rebase the series on 1971. The resources thus saved are being devoted to the analysis of the instalment credit questions contained in the inquiry into retail trading for 1976 and to a full rebasing exercise using the results of that inquiry. It is hoped the new (1976 rebased) series will be published during 1979.

The rebasing exercise

The rebasing exercise underlying the series in this article involved applying the seasonal pattern shown by the panel of retailers responding to the credit questions in the monthly retail sales inquiry during 1971 to the census totals. This provided new base figures for each month of the year, which were then projected forward using year-on-year percentage changes derived from the monthly returns of the panel. Thus the rebased series in this article still reflect certain features of the pattern of instalment credit trading by retailers in 1966. This is because the panel of contributors has not been regrouped by size, kind of business or form of organisation which would result from full rebasing. However the effect on the credit statistics is not thought to be of major importance. The series given in this article are still considered to give a valuable indication of short-term movements and of trends in credit sales by retailers.

The opportunity has also been taken to update the seasonal adjustment factors for these series to take account of the rebased figures and of recent experience.

Co-operative societies

There is one change of classification in the rebased series. The co-operative societies' credit sales figures which were previously included in the series for durable and non-durable goods have been combined into a single series 'Co-operative Societies', which is now included in the department stores series in table 2. This has led to reductions in total credit sales included in the series for 'durable goods shops' and for 'other credit retailers' with a corresponding increase in sales in the new 'department stores' category.

The new base levels

The changes to the levels of the new credit extended by, and debt outstanding to, retailers in 1971 as a result of this rebasing are not large. Total new credit extended in 1971 is now estimated as £1,046 million compared to £1,063 million previously (1966 base). Corresponding figures for debt outstanding directly to retailers at the end of 1971 are £658 million (1971 base) and £613 million (1966 base).

Further details

The December issue of Business Monitor SD8 will contain monthly figures from 1971 onwards. Further information about the rebasing exercise is available on request from Room 349, Department of Trade, Sanctuary Buildings, 16-20 Great Smith Street, London SW1P 3DB, tel. 01-215 3162.

Table 1 Hire purchase and other instalment credit business seasonally adjusted [1]

£ million

	Total		Finance houses[2]		Retailers[3]	
	New credit extended	Change in debt	New credit extended	Change in debt	New credit extended	Change in debt
1971	2 036	251	990	165	1 046	86
1972	2 466	438	1 222	296	1 244	142
1973	2 846	444	1 453	332	1 393	112
1974	2 508	—164	1 037	—160	1 471	—4
1975	2 981	—13	1 201	—55	1 780	42
1976	3 586	343	1 535	202	2 051	141
1977	4 458	625	2 072	500	2 386	125
1975						
1st qtr	710	—9	284	—9	426	—
2nd	753	10	307	—13	446	23
3rd	749	—8	304	—18	445	10
4th	769	—6	306	—15	463	9
1976						
1st qtr	833	33	340	4	493	29
2nd	872	80	382	56	490	24
3rd	914	103	393	59	521	44
4th	967	127	420	83	547	44
1977						
1st qtr	1 005	137	458	85	547	52
2nd	1 054	138	488	121	566	17
3rd	1 178	188	546	151	632	37
4th	1 221	162	580	143	641	19
1977						
January	320	36	135	13	185	23
February	338	49	156	32	182	17
March	347	52	167	40	180	12
April	346	48	154	41	192	7
May	356	47	170	45	186	2
June	352	43	164	35	188	8
July	365	52	163	41	202	11
August	417	77	201	66	216	11
September	396	59	182	44	214	15
October	382	38	172	35	210	3
November	425	63	199	45	226	18
December	414	61	209	63	205	—2
1977						
July-September	1 178	188	246	151	632	37
October-December	1 221	162	580	143	641	19
Percentage increase	3		6		1	

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[1] Some of the 1977 figures for finance houses have been altered to bring the seasonally adjusted total for the year into line with the unadjusted figure. The retailers' figures have been rebased on the 1971 census of distribution (see separate note). [2] Direct business only: ie excluding agreements block discounted with finance houses by retailers. [3] Durable goods shops, department stores and "other instalment credit retailers". For further definitions see footnotes to table 2.

Table 2 Retailers' instalment credit sales seasonally adjusted

Index numbers of value of sales per week (current prices) 1971 = 100

	Total[1]	Durable goods shops	Department stores	Other instalment credit retailers[2]
(HP and other instalment credit sales in 1971 £ million[3])	(1130)	(370)	(139)	(621)
1971	100	100	100	100
1972	117	117	106	120
1973	132	119	119	143
1974	139	94	122	169
1975	165	115	143	200
1976	190	136	162	229
1977	223	142	171	282
1975				
1st qtr	158	112	141	189
2nd	165	120	141	198
3rd	165	111	142	202
4th	172	117	146	211
1976				
1st qtr	185	136	166	217
2nd	184	134	151	221
3rd	193	136	165	234
4th	200	138	166	244
1977				
1st qtr	205	135	166	254
2nd	213	136	153	272
3rd	238	148	179	304
4th	236	148	184	299
1977				
January	207	138	173	255
February	203	132	163	254
March [4]	204	135	162	254
April	217	138	147	279
May	210	134	149	269
June [4]	212	136	162	269
July	227	147	170	288
August	243	144	171	318
September [4]	241	151	194	305
October	236	141	179	306
November	240	147	189	306
December [4]	232	155	183	288
1977				
July-September av	238	148	179	304
October-December av	236	148	184	299
Percentage increase	—1	—	2	—2

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[1] Durable good shops, department stores (including co-operative societies) and 'other instalment credit retailers'. [2] General stores (other than department stores) and general mail-order houses. [3] Excluding sales against checks issued by other organisations. [4] The monthly periods for retailers consists of four weeks except those marked [4] which are of five weeks. The period covered by December 1977 sales was the five weeks from 27 November 1977 to 31 December 1977. The corresponding period in 1976 was from 28 November 1976 to 1 January 1977.

Man-made fibres: deliveries in fourth quarter, production in December and analysis of production in fourth quarter

Deliveries of staple fibre[1]

Thousand metric tonnes

	Total	Home: Total	Home: Cotton spinning	Home: Wool spinning	Home: Flax spinning	Home: Other systems and sundries	Exports[2]
1968	282.4	173.1	52.3	58.2	26.3	36.3	109.3
1969	299.3	169.2	51.1	51.5	28.0	38.6	130.1
1970	329.4	191.4	57.6	57.1	31.5	45.2	138.1
1971	338.7	185.9	59.6	50.1	29.3	46.9	152.9

	Total	Home: Total	Home: Cotton spinning	Home: Wool spinning	Home: Other systems and sundries	Exports[2]
1972	363.9	186.4	49.5	33.4	103.5	177.5
1973	434.8	235.4	62.8	56.0	116.7	199.4
1974	346.1	190.4	51.4	51.1	87.9	155.7
1975	283.2	158.8	39.4	50.1	69.3	124.4
1976	351.3	184.6	47.0	53.0	84.6	166.7
1977	340.6	171.5	41.4	46.5	83.6	169.1
1976						
1st qtr	83.2	44.4	11.5	12.5	20.5	38.8
2nd	86.7	46.7	11.9	13.0	21.8	40.0
3rd	78.4	41.3	10.8	12.9	17.5	37.1
4th	103.1	52.2	12.8	14.7	24.7	50.9
1977						
1st qtr	105.0	48.7	12.5	13.1	23.1	56.3
2nd	84.1	43.4	11.1	12.6	19.7	40.7
3rd	78.2	37.2	7.6	10.5	19.1	41.0
4th	73.2	42.1	10.2	10.3	21.6	31.1

[1] The classification of end uses was revised in January 1972, and the figures for deliveries to individual industries from the first quarter 1972 are not comparable with those for earlier years. [2] The figures refer to deliveries from the industry direct for export and may differ from the totals recorded as exports in the monthly Overseas Trade Statistics.

Deliveries of continuous filament yarns[1]

Thousand metric tonnes

	Total	Home: Total	Home: Broad weaving	Home: Carpets and rugs	Home: Weft knitting	Home: Warp knitting	Home: Industrial purposes (tyres, etc)	Home: Other purposes	Exports as yarn[2]
1968	238.4	188.9	35.3	4.7	54.9	32.0	52.2	9.8	49.4
1969	242.7	193.6	33.7	5.5	51.9	35.3	58.8	8.4	49.1
1970	254.8	198.1	28.2	7.1	63.7	38.0	53.3	7.8	56.7
1971	261.4	198.7	25.3	8.7	69.9	41.4	43.5	9.9	62.7

	Total	Home: Total	Home: Broad weaving	Home: Carpets and rugs	Home: Warp knitting	Home: Industrial purposes (tyres, etc)	Home: Other purposes	Home: Textured or texturing for all purposes other than carpets or industrial	Exports as yarn[2]
1972	270.1	198.7	25.1	13.4	40.4	40.8	10.0	69.0	71.4
1973	313.6	227.5	25.8	19.4	46.6	45.4	13.0	77.4	86.1
1974	259.4	188.6	22.3	14.1	35.8	35.1	11.9	69.3	70.8
1975	246.9	185.8	21.7	17.3	33.1	35.4	10.5	67.8	61.1
1976	271.2	192.4	19.5	22.2	31.1	38.3	14.8	66.6	78.8
1977	239.8	167.9	18.9	16.9	26.0	35.5	10.8	59.7	72.0
1976									
1st qtr	71.4	50.7	5.0	5.9	9.1	10.5	3.7	16.6	20.6
2nd	66.6	46.7	4.9	4.8	7.5	9.3	3.4	16.7	19.9
3rd	62.5	43.5	4.4	5.2	6.7	8.5	3.3	15.5	19.0
4th	70.7	51.4	5.2	6.3	7.8	10.0	4.4	17.8	19.3
1977									
1st qtr	64.9	45.9	5.2	5.2	7.5	9.4	3.1	15.5	19.1
2nd	60.3	41.7	4.8	3.7	6.6	9.2	2.7	14.7	18.6
3rd	54.7	37.9	4.3	3.3	5.5	8.4	2.2	14.2	16.8
4th	59.9	42.4	4.6	4.8	6.3	8.5	2.9	15.3	17.6

[1] The classification of end uses was revised in January 1968 and the figures for deliveries to individual industries 1968 to 1971 might not be fully comparable with those for earlier years. From January 1972 a further reclassification was introduced: deliveries of textured yarns and yarns for texturing, which were previously included in the figures for individual industries, are shown separately from the first quarter 1972. [2] The figures refer to deliveries from the industry direct for export and may differ from the totals recorded as exports in the monthly Overseas Trade Statistics.
Source: Man-made Fibres Producers Committee.

Inquiries: 01-212 0017 or 01-212 6474.

Deliveries of man-made fibres in the fourth quarter

Total deliveries of man-made fibres in the fourth quarter of 1977 were 6 per cent less than in the fourth quarter of 1976. Deliveries of continuous filament yarns to the home trade were 18 per cent less than in the fourth quarter of 1976, while deliveries of staple fibre were 19 per cent less.
Inquiries: 01-212 0017 or 01-212 6474.

Production of man-made fibres in December

In the three months ended November 1977 the volume of production of man-made fibres,

Man-made fibre production

Thousand metric tonnes

	Total	Continuous filament (singles)	Staple fibre
1968	539.1	241.8	297.4
1969	553.9	252.5	301.5
1970	599.4	257.6	341.9
1971	613.1	276.4	336.7
1972	626.5	264.0	362.5
1973	730.8	305.6	425.3
1974	627.6	271.0	356.6
1975	562.5	246.5	316.0
1976	618.4	270.7	347.7
1977	551.8	239.3	312.5
1976			
1st qtr	159.8	70.0	89.8
2nd	157.5	69.7	87.7
3rd	140.4	62.4	78.0
4th	160.7	68.6	92.1
1977			
1st qtr	154.9	67.2	87.7
2nd	150.8	63.9	86.8
3rd	131.0	55.2	75.8
4th	115.1	53.0	62.1
1976			
January	53.3	24.1	29.2
February	52.3	22.6	29.7
March	54.1	23.2	30.9
April	53.1	22.1	31.0
May	53.6	23.9	28.6
June	51.8	23.7	28.0
July	46.7	21.1	25.6
August	43.8	19.5	24.3
September	49.9	21.8	28.1
October	53.0	22.7	30.3
November	54.3	23.3	31.0
December	53.4	22.6	30.8
1977			
January	49.1	20.9	28.2
February	50.3	21.8	28.5
March	55.5	24.5	31.0
April	52.3	20.8	31.5
May	47.7	21.5	26.2
June	50.8	21.7	29.2
July	49.5	20.8	28.7
August	37.6	16.0	21.6
September	43.9	18.4	25.5
October	43.5	18.2	25.4
November	36.8	17.9	18.9
December	34.8	17.0	17.8

Source: Production stats: Man-made Fibres Producers Committee. Index of production: Department of Industry.

seasonally adjusted, was estimated to have been 15 per cent less than in the three months ended August 1977. Total production by weight of man-made fibres in the year 1977 was 11 per cent lower than in the year 1976; output of continuous filament decreased by 12 per cent and staple fibre decreased by 10 per cent.

Index of the volume of production

1970 = 100

	Actual	Seasonally adjusted
1968	87	
1969	92	
1970	100	
1971	106	
1972	107	
1973	127	
1974	111	
1975	101	
1976	112	
1976		
1st qtr	116	115
2nd	115	112
3rd	104	110
4th	115	113
1977		
1st qtr	114	114
2nd	108	105
3rd	92	97
1976		
January	116	120
February	118	115
March	113	111
April	115	109
May	114	112
June	117	115
July	105	109
August	96	109
September	111	111
October	113	103
November	120	116
December	113	119
1977		
January	106	110
February	118	115
March	118	117
April	111	104
May	103	101
June	112	110
July	100	105
August	80	92
September	94	95
October	90	82
November	86	83

Inquiries: 01-212 0017 or 01-212 6474.

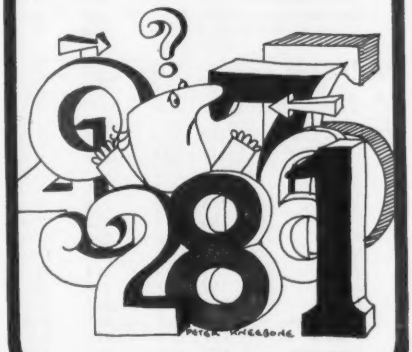
Cotton industry: production in November

Statistics issued by the Textile Statistics Bureau show that in January-November 1977 the amount of cloth woven was at the same level as in January-November 1976. Production of single yarn decreased by 4 per cent and doubled yarn increased by 1 per cent.

Inquiries: 01-212 0017 or 01-212 6474.

Guide to government statistics

See centre pages
Trade and Industry
13 January 1978



Production in the cotton industry

Annual totals and weekly averages

	Single yarn [1]		Double yarn		Woven cloth	
	Cotton yarn [2]	Spun man-made yarns and mixture yarn, inc. waste	Cotton yarn	Other	Cotton	Man-made fibre and mixtures
	million kg				million m	
1968	171.2	67.5	49.9	52.0	668.2	507.3
1969	166.2	73.2	46.8	60.9	661.5	538.1
1970	158.7	77.4	43.2	57 3	627.6	484.3
1971	133.0	83.3	85.0		559.1	479.8
1972	121.4	81.7	75 4		513 0	469.8
1973	115.4	92.5	82.1		453.2	502.3
1974	101.3	87.7	74.7		409.5	505.3
1975	94.4	76.4	68.4		405.4	503.0
1976	106.9	76.1	69.4		374.5	492.9
1976						
Jan	2.3	1.5	1.4		8.6	11.0
Feb	2.2	1.4	1.4		8.3	10.8
Mar [3]	2.3	1.5	1.4		8.3	10.5
Apr	1.9	1.4	1.2		6.6	8.7
May	2.4	1.7	1.5		8.0	10.5
Jun [3]	1.7	1.3	1.1		7.0	8.7
Jul	1.8	1.3	1.2		4.3	6.8
Aug	2.1	1.6	1.4		7.3	9.0
Sep [3]	1.8	1.3	1.2		6.4	8.7
Oct	2 3	1.7	1.6		7.9	10.6
Nov	2.4	1.7	1.6		7.9	10.7
Dec [3]	1.7	1.3	1.1		6.0	8.2
1977						
Jan	2.2	1.7	1.5		7.7	10.3
Feb	2.3	1.7	1.6		7.9	10.7
Mar [3]	2.2	1.8	1.6		7.9	10.7
Apr	1.7	1.4	1.2		6.3	8.8
May	2.3	1.9	1.6		7.9	11.1
June [3]	1.5	1.2	1.1		6.9	8.8
July	1.6	1.2	1.2		4.3	7.5
August [3]	1.9	1.5	1.4		7.6	9.5
Sep	1.5	1.2	1.2		6.3	9.0
Oct	2.0	1.6	1.4		7.9	10.5
Nov [3]	2.0	1.6	1.4		7.8	10.2

[1] Spun in cotton industry. [2] Including yarns wholly of cotton waste and mixture yarn of cotton and cotton waste. [3] Average of five weeks.

Analysis of production of man-made fibres in the fourth quarter

Production by weight of synthetic fibres in the fourth quarter of 1977 was 30 per cent lower than in the corresponding period of 1976 while production of viscose and acetate fibres was 24 per cent lower. Within the total for synthetic fibres, production of continuous filament yarns was 22 per cent less and staple fibre 38 per cent less. Under the heading 'viscose and acetate' production of continuous filament yarns decreased by 23 per cent and staple fibre decreased by 24 per cent compared with the fourth quarter 1976.

Inquiries: 01-212 0017 or 01-212 6474.

Analysis of man-made fibre production

Thousand metric tons

	Total		Continuous filament		Staple fibre	
	Synthetic	Viscose + acetate	Synthetic	Viscose + acetate	Synthetic	Viscose + acetate
1968	268.4	270.8	144.3	97.5	124.1	173.3
1969	291.4	262.5	155.9	96.6	135.5	166.0
1970	336.9	262.5	166.6	90.9	170.3	161.6
1971	357.3	255.7	191.2	85.2	166.1	170.6
1972	373.9	252.6	196.4	67.6	177.5	185.0
1973	453.9	277.0	233.0	72.6	220.9	204.4
1974	396.1	231.5	200.3	70.7	195.8	160.8
1975	361.1	201.4	184.0	62.5	177.1	138.9
1976	414.2	204.2	200.1	70.6	214.1	133.6
1977	359.2	193.0	177.1	62.6	182.1	130.4
1976						
1st qtr	104.2	55.6	52.0	18.0	52.2	37.6
2nd	105.1	52.4	52.0	17.7	53.1	34.7
3rd	97.8	42.6	46.2	16.2	51.6	26.4
4th	107.2	53.5	49.9	18.6	57.3	34.8
1977						
1st qtr	102.7	52.2	49.3	17.9	53.4	34.3
2nd	98.9	51.9	47.8	16.1	51.1	35.8
3rd	82.7	48.3	40.9	14.3	41.8	34.0
4th	74.9	40.6	39.1	14.3	35.8	26.3

The heading 'Viscose + acetate' includes triacetate.

Hosiery and other knitted goods: index of production in November

In the three months ended November 1977 the volume of production of hosiery and other knitted goods, seasonally adjusted (including knitted fabrics), was provisionally estimated to have been 2 per cent less than in the three months ended November 1976.

In using the index numbers shown in the table, it should be borne in mind that, when price increases are large, the various problems associated with constructing a constant value series become more acute. Because of these difficulties the relative accuracy of the estimates is likely to have been reduced in recent years. The actual figures allow for differences in the length of calendar months, but not for other seasonal variations.

Hosiery and other knitted goods, including warp knitting

1970 = 100

	Actual	Seasonally adjusted
1968	88	
1969	98	
1970	100	
1971	99	
1972	99	
1973	103	
1974	100	
1975	96	
1976	101	
1975		
1st qtr	87	95
2nd	95	96
3rd	94	97
4th	109	97
1976		
1st qtr	90	97
2nd	95	97
3rd	101	105
4th	119	106
1977		
1st qtr	94	102
2nd	93	95
3rd p	104	108
1976		
January	85	101
February	94	99
March	91	92
April	92	100
May	98	98
June	96	93
July	93	107
August	97	106
September	113	102
October	133	107
November	126	104
December	96	106
1977		
January	92	108
February	96	102
March	94	95
April	90	98
May	94	95
June	94	91
July p	97	111
August p	97	105
September p	119	107
October p	126	101
November p	120	98

p Provisional.

Inquiries: 01-212 0017 or 01-212 6474.

Wholesale textile houses: sales and stocks in November

Sales by wholesale textile houses in November showed a decrease of 4 per cent on a year earlier, compared with an increase of 3 per cent in September and an increase of 9 per cent in October.

The value of stocks at the end of November showed an increase of 7 per cent compared with the same period last year.

Table 1 **Textiles: wholesale sales and stocks**

Index numbers and *percentage increase compared with a year earlier* 1950 = 100

		Value of home sales		Value of stocks end period	
1966		110	*−3*	..	..
1967		104	*−5*	..	..
1968		108	*4*	..	..
1969		103	*−5*	..	..
1970		107	*4*	..	..
1971		115	*8*	..	..
1972		121	*5*	..	..
1973		134	*11*	..	..
1974		147	*9*	..	..
1975		147	*1*	..	..
1976		146	*−1*	..	..
1974	1st quarter	134	*12*	189	*3*
	2nd quarter	131	*7*	202	*18*
	3rd quarter	148	*13*	194	*12*
	4th quarter	173	*6*	198	*−3*
1975	1st quarter	143	*7*	219	*16*
	2nd quarter	135	*3*	197	*−2*
	3rd quarter	146	*−1*	193	*−1*
	4th quarter	165	*−5*	224	*13*
1976	1st quarter	133	*−8*	234	*7*
	2nd quarter	127	*−6*	212	*8*
	3rd quarter	149	*2*	204	*6*
	4th quarter	176	*8*	228	*2*
1977	1st quarter	140	*5*	252	*7*
	2nd quarter	125	*−2*	224	*6*
	3rd quarter	153	*3*	214	*5*
1976	November	169	*−13*	229	*−1*
	December	175	*15*	228	*2*
1977	January	85	*−1*	221	*4*
	February	148	*8*	248	*9*
	March	186	*7*	252	*7*
	April	139	*2*	228	*10*
	May	129	*1*	242	*11*
	June	108	*−9*	224	*6*
	July	119	*3*	239	*8*
	August	142	*4*	227	*5*
	September	199	*3*	214	*5*
	October	201	*9*	212	*2*
	November	163	*−4*	245	*7*

Inquiries

These statistics are prepared by Textile Distributors' Association. Inquiries should be addressed to the Secretary, Textile Distributors' Association, 3 Berners Street, London W1P 4JP, tel. 01-580 2902.

Table 2 **Analysis by department**

Percentage increase compared with a year earlier

	Sales		Stocks[1]
	Nov 1977	Jan-Nov 1977	Nov 1977
Women's knitted outerwear, blouses and skirts	−17	7	36
Women's coats, costumes, furs and raincoats	−4	−8	63
Women's underwear	−10	4	18
Women's hose and children's socks	2	14	−3
Women's millinery	−25	−3	−35
Haberdashery, ribbons and wool	3	12	−5
Children's wear	16	4	5
Men's and boys' shirts, pyjamas and outfitting	−18	1	−2
Gloves	−6	16	−25
Piece-goods and nets	10	−15	−18
Household textiles	−10	8	3
Floor coverings, furniture and hardware	−2	—	7
Boots and shoes	−15	8	1
Total[2]	−4	2	7

[1] Including some items not included among the sub-headings. [2] Values at cost.

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Acquisitions and mergers of industrial and commercial companies: fourth quarter 1977

The number of acquisitions of industrial and commercial companies and the total amount paid for them both fell in the fourth quarter of 1977, following rises in the previous quarter, though they remained higher than at any other time since about mid-1974. In 1977 as a whole 482 companies were acquired for £812 million compared with 353 companies for £427 million in the previous year. For numbers of acquisitions, the 1977 figure is the highest since 1974, when 504 companies were acquired; for the amount paid, the 1977 figure is the highest since 1973, when the amount paid was £1,304 million.

The financial press reported 126 companies acquired for £206 million in the fourth quarter of 1977, compared with 144 companies acquired for £274 million in the previous quarter. But, as table 1 shows, apart from the previous quarter the latest figures are higher than those for any other time since about mid-1974.

Acquisition activity was particularly high during 1972 and 1973 but it fell sharply between late 1973 and early 1975. Since then activity has generally risen but is still well below the peak of late 1972 and early 1973.

There were three acquisitions for amounts over £10 million during the fourth quarter of 1977. In the largest, Coalite and Chemical Products acquired Charringtons Industrial Holdings for £24.1 million. In the other two, Trafalgar House acquired Morgan Grampian for an amount provisionally estimated as £20.7 million and BICC acquired Dorman Smith Holdings for, provisionally, £18.3 million.

Table 2 shows that, as usual, the great majority of acquisitions in the fourth quarter of 1977 were for relatively small amounts. The 22 largest acquisitions, 17 per cent of the total number, which were acquired for amounts over £2 million, accounted for 74 per cent of the total expenditure. The average cost of acquisitions during the quarter was £1.6 million, compared with £1.7 million during 1977 as a whole and £1.2 million during 1976.

Table 3 shows that in the fourth quarter of 1977 the percentage of total expenditure in the form of cash rose, and that the percentage in the form of ordinary shares fell, compared with the previous quarter. The percentage in the form of fixed interest securities was again very low. The percentages of total expenditure accounted for by these three methods of payment tend to vary considerably from quarter to quarter but, as the annual figures in the table show, the percentage in cash has tended to be high since 1973 compared with earlier years and the percentages in ordinary shares and fixed interest securities have tended to be low. The percentage in fixed interest securities has generally been very low from 1974 onwards.

Tables 1, 2 and 3 are taken from a more detailed analysis published in Business Monitor M 7, Acquisitions and Mergers of Industrial and Commercial Companies (obtainable from HMSO each quarter for an

Table 1 **Acquisitions and mergers within the United Kingdom**

	Total all acquisitions and mergers			Acquisitions of independent companies and mergers									Sales of subsidiaries between company groups		
				Total			Acquisitions of independent companies			Mergers[1]					
	Number acquiring	Number acquired	Value £m	Number acquiring	Number acquired	Value £m	Number acquiring	Number acquired	Value £m	Number acquiring	Number acquired	Value £m	Number acquiring	Number acquired	Value £m
1969	686	846	1 068.9	595	744	969.2	593	742	961.6	2	2	7.6	91	102	99.7
1970	629	793	1 122.5	490	614	996.6	484	608	954.1	6	6	42.5	139	179	125.9
1971	687	884	911.1	498	620	745.6	498	620	745.6	—	—	—	189	264	165.5
1972	928	1 210	2 531.6	716	938	2 346.2	710	931	2 336.9	6	7	9.3	212	272	185.4
1973	929	1 205	1 304.3	724	951	1 057.5	722	949	1 055.2	2	2	2.3	205	254	246.8
1974	427	504	508.4	307	367	459.1	306	366	451.6	1	1	7.5	120	137	49.3
1975	276	315	290.8	180	200	221.0	177	197	215.1	3	3	5.9	96	115	69.8
1976	315	353	427.2	218	242	327.5	217	241	327.1	1	1	0.4	97	111	99.7
1977	428	482	812.2	333	372	716.7	331	370	687.1	2	2	29.6	95	110	95.5
1974															
1st qtr	152	191	252.6	116	149	231.3	116	149	231.3	—	—	—	36	42	21.3
2nd	105	128	129.8	68	83	118.1	68	83	118.1	—	—	—	37	45	11.7
3rd	90	101	75.5	65	74	66.5	64	73	59.0	1	1	7.5	25	27	9.0
4th	80	84	50.5	58	61	43.2	58	61	43.2	—	—	—	22	23	7.3
1975															
1st qtr	50	56	47.1	35	37	38.4	34	36	36.9	1	1	1.5	15	19	8.7
2nd	82	99	50.8	52	62	38.0	51	61	37.4	1	1	0.6	30	37	12.8
3rd	81	88	111.9	50	55	77.5	50	55	77.5	—	—	—	31	33	34.4
4th	63	72	81.0	43	46	67.1	42	45	63.3	1	1	3.8	20	26	13.9
1976															
1st qtr	82	93	71.3	62	71	65.3	61	70	64.9	1	1	0.4	20	22	6.0
2nd	81	93	93.3	49	55	44.3	49	55	44.3	—	—	—	32	38	49.0
3rd	86	95	108.1	55	60	76.3	55	60	76.3	—	—	—	31	35	31.8
4th	66	72	154.5	52	56	141.6	52	56	141.6	—	—	—	14	16	12.9
1977															
1st qtr	92	100	130.8	77	85	121.8	77	85	121.8	—	—	—	15	15	9.0
2nd	100	112	202.4	76	84	166.3	76	84	166.3	—	—	—	24	28	36.1
3rd	124	144	273.5	95	109	241.5	93	107	211.9	2	2	29.6	29	35	32.0
4th	112	126	205.5	85	94	187.1	85	94	187.1	—	—	—	27	32	18.4

[1] A merger (which takes place when two companies combine to form a new company) is reckoned as the acquisition of the smaller company by the larger and is valued at the market value of the smaller company's share of the newly formed company.

Table 2 **Size distribution of acquisitions within the United Kingdom**

	1976		1977		1977 1st quarter		1977 2nd quarter		1977 3rd quarter		1977 4th quarter	
Expenditure £m	Number acquired	Value £m	Number acquired	Value £m	Number acquired	Value £m	Number acquired	Value £m	Number acquired	Value £m	Number acquired	Value £m
Over 25	1	47.5	2	60.9	1	31.4	—	—	1	29.5	—	—
Over 5 and up to 25	17	152.9	36	437.6	4	41.0	11	125.2	12	161.4	9	110.0
Over 2 and up to 5	31	103.3	38	125.9	7	25.7	11	38.1	7	20.8	13	41.3
2 or less	304	123.5	406	187.8	88	32.7	90	39.1	124	61.8	104	54.2
Total	353	427.2	482	812.2	100	130.8	112	202.4	144	273.5	126	205.5

Table 3 Categories of expenditure on acquisitions and mergers within the United Kingdom

	Expenditure (£ million)				Percentage of expenditure		
	Total	Cash	Issues of ordinary shares	Issues of fixed interest securities	Cash	Issues of ordinary shares	Issues of fixed interest securities
1969	1 069	296	552	221	27.7	51.6	20.7
1970	1 122	251	596	275	22.4	53.1	24.5
1971	911	285	437	189	31.3	48.0	20.7
1972	2 532	493	1 459	580	19.5	57.6	22.9
1973	1 304	691	466	147	53.0	35.7	11.3
1974	508	347	114	47	68.3	22.4	9.3
1975	291	173	93	25	59.4	32.0	8.6
1976	427	302	118	7	70.7	27.7	1.6
1977	812	508	296	8	62.6	36.4	1.0
1974							
1st qtr	252.6	189.8	51.0	11.8	75.1	20.2	4.7
2nd	129.8	68.9	27.3	33.6	53.1	21.0	25.9
3rd	75.5	42.3	32.6	0.6	56.1	43.1	0.8
4th	50.5	46.2	3.3	1.0	91.5	6.5	2.0
1975							
1st qtr	47.1	38.7	7.1	1.3	82.2	15.0	2.8
2nd	50.8	33.5	17.3	—	65.9	34.1	—
3rd	111.9	64.4	24.0	23.5	57.6	21.4	21.0
4th	81.0	36.2	44.6	0.2	44.7	55.1	0.2
1976							
1st qtr	71.3	37.9	32.6	0.8	53.2	45.7	1.1
2nd	93.3	83.1	9.5	0.7	89.1	10.2	0.7
3rd	108.1	81.0	26.6	0.5	74.9	24.6	0.5
4th	154.5	99.8	49.8	4.9	64.6	32.2	3.2
1977							
1st qtr	130.8	95.7	35.0	0.1	73.2	26.7	0.1
2nd	202.4	113.7	84.6	4.1	56.2	41.8	2.0
3rd	273.5	149.5	120.8	3.2	54.7	44.1	1.2
4th	205.5	149.2	55.4	0.9	72.6	27.0	0.4

annual subscription of £1.00). The Business Monitor also contains tables analysing acquisitions and mergers by industry.

Notes

This analysis relates only to industrial and commercial companies in the United Kingdom and is based on reports in the financial press supplemented by special inquiries to companies to determine the form, value and timing of particular acquisitions. The Bank of England compiles an analysis of acquisitions and mergers relating to financial companies (banks, insurance companies, etc) which is published in the *Bank of England Quarterly Bulletin.*

No method of valuing acquisitions is altogether free from objection. The values shown here relate in general to expenditure during the current period, excluding any previous investments in the company acquired. Where possible, the values are market values, ie the cash paid or the market price at date of issue of shares or loan stock issued. Where market values are not available (as in the case of unlisted securities) or the cash payment is not disclosed, acquisitions are in general valued at the net book value of the acquired company. When comparing the series over time one must allow for the considerable short-term fluctuations in share prices, in addition to allowing for the general inflation of values.

Where the acquired company was a subsidiary of another United Kingdom company, the transaction is classified as a sale between company groups. Acquisitions between subsidiaries of the same company group, in the course of internal reorganisation, have been ignored.

As far as possible, acquisitions are recorded at the date when the transaction is finalised (eg when a bid is declared unconditional). This date usually comes before the date on which the shares in the acquired company are surrendered, although it may be considerably later than the date when the bid is first announced in the press. Revisions to the data may occur from time to time if there are acquisitions and mergers which come to light after the publication of the article.

Inquiries: Economics and Statistics Division 6a, Departments of Industry, Trade and Prices and Consumer Protection, Room 248, 1 Victoria Street, London SW1H 0ET, tel. 01-215 5538.

Private sector's share of labour force on the increase

The private sector's share of the employed labour force fell from 72.9 per cent in June 1971 to 70.5 per cent in June 1976. But early indications are that the numbers employed by central government, local authorities, and public corporations were all reduced between June 1976 and June 1977, and that during that period the private sector's share of total employment increased.

Of a total employed labour force of about 24¾ million in June 1976 nearly 17½ million were employed in the private sector. The remaining 7¼ million were employed by central government (2¼ million), local authorities (3 million) and public corporations (2 million).

These statistics are given in the December issue of *Ecomic Trends* (HMSO, £1.95) in an annual article analysing employment in the United Kingdom by sector and broad industry group; this year there are figures from 1971 to 1976.

Major developments between June 1971 and June 1976 were: a reduction of ¾ million in the total employed in private sector manufacturing industries, and a rather larger increase in the number of civilians employed in services by central government and local authorities – mainly in health, education and social services.

This article includes for the first time an analysis by industry group for self-employed persons.

International comparison of taxes

Another article in *Economic Trends* gives international comparisons of taxes and social security contributions.

It is the latest in a series of annual articles comparing average levels of taxation in various countries in the period 1969-75. The number of countries included in the analysis has been increased to 19 and the scope of the analysis widened to include taxes on capital.

In 1975, the latest year for which comparable figures are available, taxes and social security contributions in total in the United Kingdom were equivalent to just over 40 per cent of gross national product at factor cost. This put the United Kingdom in about middle position among the 19 countries. The Scandinavian countries and the Netherlands were at the top of the list, with taxes and social security contributions in excess of 50 per cent of gnp, while for Japan and Greece the figures were below 30 per cent.

Over the period since 1970 most countries showed a decline in the share of total taxes and social security contributions raised through taxes on expenditure, and an increase in the shares taken by taxes on income and by social security contributions. For the United Kingdom over this period, taxes on expenditure declined from 42½ per cent of the total to 36 per cent, while taxes on income rose from 42 to 46 per cent and social security contributions from 14 to 18 per cent.

Increase in UK energy consumption forecast

A further increase in inland primary energy consumption is expected this year, with demand rising by nearly 1.5 per cent to reach a level of 337 million tons of coal equivalent (mtce) or 201 million tonnes of oil equivalent (mtoe). This, says the Department of Energy in its current issue of *Energy Trends*, is marginally below the forecast of 339 mtce published in Energy commission paper 3. It reflects the present slightly less buoyant view of prospects in manufacturing industry as compared with other sectors of the economy.

Provisional figures for 1977 indicate an increase of 2 per cent in energy consumption. Estimates show that consumption in 1977 was about 332 mtce or about 198 mtoe. They represent an increase of some 7 mtce (4 mtoe) on the 1976 level of consumption and the same level of consumption as in 1974, which, in turn, was about 4.5 per cent lower than the 1973 peak level of 348 mtce (208 mtoe). The continued sluggishness in economic growth is the main reason for the lower level of energy consumption than was forecast a year ago.

Coal – demand expected to remain steady

Deep-mined coal output, which fell from 108 million tons in 1976, to 104 million tons in 1977, a drop of nearly 4 per cent, is expected to show a small increase in 1978 largely as a result of new investment and an improvement in manpower productivity. Opencast production for 1977, at 13.3 million tons, was over 13 per cent higher than the previous year.

Crude oil production from the North Sea, which, in 1977, was slightly below earlier expectations at 37.5 million tonnes, is expected to continue to expand rapidly in 1978. For 1978 as a whole, gas could provide 20 per cent of total inland primary energy requirements, or 16 800 million therms. Demand for electricity was higher than anticipated in 1977, and a further increase of 3 per cent is expected in 1978. About 14 per cent of supplies, the same proportion as in 1977, are likely to be generated from nuclear stations.

British Film Fund Agency returns

The British Film Fund Agency has authorised the publication of the following information for the 14 weeks ended 31 December 1977.

	£
Distributors' earnings submitted	
Low-cost films:	
Eligible (after multiplying by 2½)	19 864
Not eligible for 2½ times rental)	54 180
	74 044
High-cost films (including newsreels after multiplying by 2½)	405 317
	479 361
Films under 3000 ft (after multiplying by 2½)	64 375
	543 736
Levy collections paid to agency by HM Customs and Excise to 10 January 1978 including an estimate of collections approxmately covering entertainments for the five weeks ended 31 December 1977	307 000

The second interim allocation for the 21st year will be at the rate of 35 per cent.

Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 3 February 1978.

BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
BRITISH					
The Great Pram Race	BR/E 39461/5/2/83	23	1 February	Rank Film Distributors Ltd	James Hill Productions Ltd
The Black Panther	BR/E 39462/5/2/83	97	2 February	Alpha Films Ltd	Impics Ltd
Silver Bears	BR/E 39463/5/2/83	105	3 February	EMI Films Ltd	Raleigh Film Productions Ltd
Fast Company	BR/E 39464/5/2/83	23	3 February	Twentieth Century-Fox Film Co Ltd	New Decade Films Ltd
Movietone News 2539	BR/E 39387/5/2/83	8	3 February	British Movietonews Ltd	British Movietonews Ltd
FOREIGN					
The Savage Bees	F 39465	90	3 February	Columbia-Warner Distributors Ltd	Alan Landsburg Productions, California
The Incredible Melting Man	F 39466	83	3 February	Columbia-Warner Distributors Ltd	Rosenberg-Gelfman Productions, California

Correction to the Register
The name and address of the maker of the film (a) 'Sexier than Sex', (b) 'Lovelier than Love' F 37837 registered on 4 December 1974 has been corrected to English Film Co Ltd, 84-88 Wardour Street, London W1.

Trade and Industry index

The index for volume 28 of *Trade and Industry,* covering the months July to September 1977, was published as a loose insert with the issue of 23 December 1977.

Index to statistics published regularly in 'Trade and Industry'

(a) annually (m) monthly (q) quarterly

Aerospace cost indices	3 Feb 78
Air transport: trade by air (a)	1 Jul 77
Balance of payments	
current account (m)	20 Jan 78
summary (q)	16 Dec 77
overseas royalties	12 Aug 77
trends in invisibles	7 Oct 77
see also Overseas trade of the UK	
Business names and limited partnerships (a)	page 319
Capital expenditure:	
manufacturing, distributive and service industries (q)	6 Jan 78
provisional (q)	2 Dec 77
by regions	18 Feb 77
leasing, hiring and renting out (a)	30 Sept 77
see also Investment	
Catering trades turnover (q)	18 Nov 77
Check trading (a)	12 Aug 77
Chemicals industry activity (q)	6 Jan 78
Companies	
acquisitions and mergers (q)	page 325
insolvencies (q)	3 Feb 78
liquidity (q)	9 Dec 77
new registrations:	
Gt. Britain (m)	3 Feb 78
N. Ireland (m)	27 Jan 78
rate of return on capital (a)	16 Sept 77
structure of company financing	3 Feb 78
Construction work overseas (a)	4 Nov 77
Earnings, wage rates (m)	3 Feb 78
Energy trends (m)	page 326
Engineering industries:	
production indices (m)	3 Feb 78
sales and orders (m)	27 Jan 78
Film industry	
British Film Fund Agency returns (m)	page 327

cinema admissions and takings (m)	27 Jan 78
annual inquiry (a)	30 Sept 77
exhibitors' quota returns (a)	6 May 77
overseas payments and earnings (a)	26 Aug 77
registrations of films (a)	3 Feb 78
Food	
consumption levels (6m)	18 Nov 77
household consumption (q)	23 Dec 77
Footwear industry:	
deliveries and stocks (m)	20 Jan 78
Foreign trade: industrial	
countries' economic indicators (m)	3 Feb 78
quarterly analysis (q)	2 Dec 77
see also Overseas trade of the UK	
Hire purchase business (m)	page 320
Industrial production	
index numbers (m)	27 Jan 78
Scotland (q)	23 Dec 77
Wales (q)	21 Oct 77
Insurance companies:	
investments and assets (a)	11 Nov 77
Investment	
book values of overseas direct investments (every 3 years)	25 Feb 77
industry's investment intentions (3 times a year)	6 Jan 78
investment and earnings overseas (a)	5 Aug 77
see also Capital expenditure	
Made-up clothing:	
orders and deliveries (m)	20 Jan 78
Man-made fibres	
deliveries (q)	page 322
production (m)	page 322
production: quarterly analysis (q)	page 323
Metal-working machine tools (m)	20 Jan 78

Motor industry	
car and commercial vehicle production (m)	3 Feb 78
provisional (m)	13 Jan 78
motor trade turnover (q)	25 Nov 77
Office development permits (q)	2 Dec 77
Official reserves (m)	page 319
Overseas trade of the UK	
direct exporters and credit terms (a)	12 Aug 77
analysis of trends (q)	9 Dec 77
backrun (a)	11 Mar 77
export prospects (q)	9 Dec 77
invoicing in foreign currencies	22 Apr 77
see also Balance of payments	
Pension funds: investments and assets (a)	11 Nov 77
Price Commission index (m)	20 Jan 78
Regional development grants (q)	4 Nov 77
Research and development expenditure	24 Jun 77 and 1 Jul 77
Retail prices index (m)	27 Jan 78
Retail trades	
sales (m)	page 319
provisional figures (m)	20 Jan 78
stocks (m)	20 Jan 78
Royalties: overseas transactions (a)	12 Aug 77
Selective financial assistance	
section 7 (m)	3 Feb 78
section 7 £10,000 or more (q)	25 Nov 77
section 8 (q)	25 Nov 77
Shipping	
nationality of vessels in UK seaborne trade (a)	9 Sept 77
UK revenue (a)	30 Sept 77
Steel: consumption and stocks (q)	13 Jan 78

Stocks	
manufacturers' and distributors' (q)	6 Jan 78
provisional (q)	2 Dec 77
manufacturers' (m)	27 Jan 78
retail (m)	20 Jan 78
Television: overseas payments and earnings (a)	26 Aug 77
Textiles	
activity in the industry (q)	13 Jan 78
carpet sales (m)	20 Jan 78
cotton industry production (m)	page 323
hosiery production (m)	page 324
wholesale houses' sales and stocks (m)	page 324
wool exports (q)	16 Dec 77
wool output (m)	16 Dec 77
Tourism	
foreign arrivals (m)	27 Jan 78
overseas travel and tourism (a)	29 Jul 77
overseas travel and tourism (q)	20 Jan 78
Unemployment (m)	23 Dec 77
Wholesale prices	
average prices of selected commodities (a)	13 May 77
index numbers (m)	20 Jan 78
initial summary (m)	page 318

Organisational information

Commercial representation guide	28 Oct 77
ECGD local offices	12 Aug 77
ECGD lines of credit	13 Jan 78
European public holiday guide	25 Nov 77
Government statistics guide	13 Jan 78
Guide to departments	2 Sept 77
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Index, July-Sept	23 Dec 77
OTAR contact points	13 Jan 78
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304	314	324	334	344	354	364	374	384	394	404	414	424	434	444	454	464	474	484	494
305	315	325	335	345	355	365	375	385	395	405	415	425	435	445	455	465	475	485	495
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308	318	328	338	348	358	368	378	388	398	408	418	428	438	448	458	468	478	488	498
309	319	329	339	349	359	369	379	389	399	409	419	429	439	449	459	469	479	489	499
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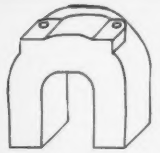

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Registered as a Newspaper Published by Her Majesty's Stationery Office, Atlantic House, Holborn Viaduct, London EC1P 1BN, for the Department of Industry, 1 Victoria Street, London SW1H 0ET. Printed by The Garden City Press Limited, Pixmore Avenue, Letchworth, Herts, SG6 1JS.

ISBN 0 11 725258 1
ISSN 0006-5323